



CASE STUDY

Acuity Chooses Jirav to Standardize Services, Engage Clients and Provide Internal Transparency

“ With Jirav, we’re able to deliver real-time insight across finance, operations, personnel and other areas of the business within minutes. We can set up custom drivers and KPIs for nearly anything so we can help our clients, and our own team, understand the big picture and make more intentional, impactful decisions. ”

— Matthew May,
Acuity Founder and
VP Sales and Marketing

ACUITY CHALLENGES

- Unable to find a financial planning solution that fit the needs of the firm and their clients
- Accounting team using disparate processes and solutions for each client engagement
- Lack of transparency within organization

TOP JIRAV ADVANTAGES FOR ACUITY

- Standardized service delivery
- Driver-based planning
- Companywide transparency
- Real-time, rolling forecasts
- Building financial literacy

SOLUTION

- Jirav Partner Program
- Full Jirav Platform (Lite, Pro & Enterprise)





Acuity Chooses Jirav To Standardize Services, Engage Clients and Provide Internal Transparency

INDUSTRY: OUTSOURCED ACCOUNTING AND FINANCIAL SERVICES

Acuity is a full-service financial firm specializing in helping early-stage companies take the next step by combining a wide range of practical accounting solutions, strategic advice and modern technology.

As an outsourced shared service partner, Acuity's team of 85 finance professionals support more than 400 startup organizations through everything from balancing the books to outsourced CFO services to guiding them through their first acquisition.

www.acuity.co

With over 150 technical certifications across the team, Acuity isn't your typical financial services firm. "We are a tech-forward company always on the lookout for modern tools that will help us solve problems and build success for our clients and our firm," explains Matthew May, Founder and VP Sales and Marketing for Acuity.

Matthew and Acuity's co-founder, Kenji Kuramoto, heard about Jirav in 2016 as a cloud-based financial modeling solution that would help them enhance, expand and streamline their service delivery.

"We thought it was an incredibly powerful product that had a lot of potential. After meeting Martin, Steve and Sameer with Jirav, we knew they 'get it' and could deliver exactly what we were looking for," adds Matthew.

Fast forward a few years and Jirav has completely transformed how Acuity is using data as a strategic advantage for their clients and their own firm.



“

Jirav provides elegant dashboards and also helps us seamlessly transition our clients into planning and modeling when they are ready.

— **Matthew May,**
Acuity Founder and
VP Sales and Marketing

”



STANDARDIZED SERVICE DELIVERY

After evaluating Fathom, Futrli, and Spotlight Reporting, Acuity chose Jirav's cloud financial planning and analysis solution for several reasons. "The other platforms didn't meet our needs on the planning side," explains Matthew. "Jirav provides elegant dashboards and also helps us seamlessly transition our clients into planning and modeling when they are ready."

DRIVER-BASED PLANNING

Jirav's driver-based planning enables Acuity to build highly customized budgets, forecasts, models and reports that engage business leaders with their data, which isn't always easy to do.

"With Jirav, we're able to deliver real-time insight across finance, operations, personnel and other areas of the business within minutes. We can set up custom drivers and KPIs for nearly anything so we can help our clients, and our own team, understand the big picture and make more intentional, impactful decisions."

COMPANYWIDE TRANSPARENCY

In 2016, Acuity had a rough year and had to reduce the size of their sales team which caught everyone by surprise. "At first, we didn't understand why people were surprised and it made us realize we needed to do a better job of communicating the state of the company," explains Matthew.

With a commitment to be as transparent as possible, and Jirav's unlimited access for read-only users, Acuity built their own dashboards and shared them with every employee. The dashboards show the overall health of Acuity from debt to revenue to customer acquisition costs.

"Transparency isn't for everyone," Matthew says, "but we wanted to instill confidence and trust in our team which is important to us. The metrics are great conversation starters and, just like the entrepreneurs we advise, you've got to be

open to talking about the hard times as well as the good. If we were using Jirav ourselves in 2016, we might have seen more clearly that we only needed 7 people on our sales team, not 14."

REAL-TIME, ROLLING FORECASTS

Acuity also uses Jirav internally for rolling forecasts and in their monthly management team meetings. "We've seen a great improvement in real-time access to key stats versus our old way of waiting for our all-hands meetings or sharing Google Sheets," said Matthew.

Adds Lisa Gilreath, VP of Operations for Acuity, "Jirav is an excellent tool for dashboarding and planning by eliminating unnecessary data entry through multiple integration points. The team can update our KPIs and reports in just a few clicks after the month-end close. The ability to add custom metrics through a Google Sheets import allows us to keep focused on the levers that drive growth and gives me back the time previously spent crunching numbers in Excel. And their support sets the bar high for both customer service and training."

BUILDING FINANCIAL LITERACY

Matthew has been actively involved with Jirav from the beta version and is part of their advisory board. He meets with Jirav's leadership three to four times per month to brainstorm ideas, share client feedback and discuss ways to solve problems.

"I've really seen the progression of Jirav as a product and as a company. The expertise and innovation of the founding team is exceptional. Each has the passion of someone who has had the pain we experienced in the old Excel-based world and a vision for what things should be like. They are helping people progress not just in business, but in financial literacy."

Matthew May

Contact Jirav to learn more about cloud financial planning and analysis solutions for your business or accounting firm.

Start your free trial today

✉ info@jirav.com
🌐 www.jirav.com

