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How does one of the nation's leading business services firms help its clients identify growth opportunities, improve processes, and increase profitability?

CBIZ Uses ProSystem^{fx} Profit Driver

Ranked as one of the top ten accounting services providers, one of the ten largest valuation firms, and the number one benefits specialist in the United States, CBIZ relies on ProSystem^{fx} Profit Driver to give their clients a superior level of insight and service.

“As a powerful communications tool, ProSystem^{fx} Profit Driver enables CBIZ advisors to identify and communicate to clients exactly where their potential opportunities are to improve financial performance while growing their organization culturally.”

– Andre Gien, CBIZ, Director Strategic Consulting



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SMARTER SOLUTIONS + UNPRECEDENTED INTEGRATION = PEAK PERFORMANCE

BUSINESS PLANNING THAT LOOKS AT THE WHOLE PICTURE

Based in Cleveland, Ohio, CBIZ (formerly Century Business Services) is a publicly traded firm with a mission of making their clients' business easier and more profitable. With annual sales of more than \$524 million and nearly 5,000 employees in 140 offices nationwide, CBIZ offers an across-the-board scope of professional services and solutions for small- and medium-sized businesses, including accounting and tax, benefits and insurance, payroll solutions, healthcare consulting, medical practice management, capital advisory services, and more. CBIZ also provides tax, wealth management, and financial advisory services for individuals.

By providing clients with individualized, personal attention from trusted local advisors backed by the resources and strength of a national company, CBIZ has established its reputation as the premier source of professional and business services nationwide.

CBIZ Key Data

- Based in Cleveland, Ohio
- Steven L. Gerard, CEO & Chairman
- Approximately 5,000 employees in 140 offices nationwide
- #1 benefits specialist in the U.S.
- One of the top 10 accounting service providers in the U.S.
- One of the 10 largest valuation firms in the U.S.



Andre Gien, CBIZ, Director Strategic Consulting

CLEARING THE PATH TO PROFITABILITY

Although CBIZ is a large national organization, the company's hallmark is its ability to provide insight and guidance on a one-to-one level, with trusted advisors who share their clients' vision of business success. Rather than focusing on narrow aspects of a client organization, CBIZ advisors take a holistic view, offering strategy and guidance to help clients identify and overcome obstacles to success while seeking out opportunities for growth and profitability. By providing insight, solutions, and services, CBIZ makes it easier for clients to successfully manage their business while freeing up time to focus on core strengths and capabilities.

By turning historical financial data into an actionable strategy, ProSystem fx Profit Driver helps CBIZ professionals take financial analysis to a new level. Using the ProSystem fx Profit Driver What If function, CBIZ advisors can clearly communicate to clients the impact of business decisions before they are made.

"ProSystem fx Profit Driver is a key driver to making good decisions. For example, if a client wants to establish a new division, the technology is so powerful it actually communicates the impact on the income statements, balance sheets, and cash flow in a very clear and consistent manner."

– **Andre Gien, CBIZ, Director Strategic Consulting**

"Management blind spot" is a familiar phrase in the CBIZ lexicon. Time and again, the company has realized success by taking an objective look at a client organization and clearly defining the problems that are hindering success. Often, what the client pinpoints as a problem is really just a symptom. By deploying their proprietary "performance management system," supported by the ProSystem fx Profit Driver technology, CBIZ exposes the blind spots, helps clients clearly understand the problems, and establishes methods and practices to improve performance and prevent future problems from occurring. As clients continue to grow and prosper from the strategy and guidance provided by CBIZ advisors, the company has established itself as a trusted financial advisor and business-consulting powerhouse that provides forward-thinking solutions and quantifiable results.

A POWERFUL COMMUNICATIONS TOOL THAT TURNS DATA INTO ACTION

Unlike competing software products, ProSystem fx Profit Driver does not simply generate reports. Instead, it utilizes standardized methodologies that enable users to effortlessly turn financial statements into tactical plans.

- Dynamic budget vs. actual reporting allows users to make projections as they budget.
- Users can produce up to 40 consecutive periods, resulting in a true understanding of financial performance.
- New benchmarking data functionality compares business performance against industry standards.
- Clients can instantly see the outcomes of what-if scenarios.

As CBIZ has experienced, ProSystem fx Profit Driver offers unlimited strategy development options, including the ability to:

- Understand financial data with the most comprehensive analysis tools available.
- Develop future business goals using the flexible Projection, What If, Goalseeking, and Benchmarking tools.
- Create powerful graphics and highlight trends for up to 40 periods.
- Seamlessly integrate with the industry leading ProSystem fx Office.

"Profit Driver allows our advisors to simplify the really complex issues that face an organization from a financial viewpoint. It enables businesses to communicate and understand how they really work."

- **Andre Gien, CBIZ, Director Strategic Consulting**

A PRIMARY NEW BUSINESS DEVELOPMENT TOOL

When an opportunity for new business development arises, CBIZ begins by showing their prospective new client several financial scenarios that could be developed to help achieve higher profit margins and better cash management. These scenarios are created using ProSystem fx Profit Driver. Once the prospect sees how CBIZ puts this technology to work using their proven methodologies, more often than not, it's a win-win situation for both parties. Plus, through ProSystem fx Profit Driver, CBIZ has been able to open an entirely new revenue stream by developing an entirely new business unit.

"We actually show our new business clients what we will be doing for them using Profit Driver, showing them what it does and what Profit Driver will allow them to do - this is key to acquiring many types of new business for us."

– **Andre Gien, CBIZ, Director Strategic Consulting**



ProSystem fx Profit Driver enables users to effortlessly turn historical financial data into actionable strategy.

THE RESULTS: DEVELOPING THE LEARNING ORGANIZATION

CBIZ believes in human interaction — no software program can take the place of one-on-one communication and cooperation. However, by integrating the power of ProSystem fx Profit Driver into their established performance management system, CBIZ has strengthened its ability to help clients improve financial and operational performance. Rather than instinctively reacting to problems and blind spots, as many companies tend to do, CBIZ clients are given the tools to become "learning organizations," working proactively to prevent problems and foresee potential obstacles to success. With ProSystem fx Profit Driver, CBIZ can create a common understanding among different managers at a single organization. Says Andre Gien, "Once everybody is on the same page, it is easy to help them get where they want to go."

HOW CBIZ VIEWS THE FUTURE: EXPANDING OPPORTUNITIES FOR EMPLOYEES AND CLIENTS

As organizations continue to diversify, business consultants and financial advisors are being called upon to provide strategic direction that works holistically, providing a common thread across various industries and different business units. This requires an expanded knowledge base, extended capabilities, and technology that does more than simply generate data. Success will be based on a company's ability to bring "meaning to the numbers" — thereby achieving true alignment of performance and profitability.

In addition, only those accounting entities that are able to recruit and retain top-level accounting professionals will thrive. According to CBIZ, technology such as ProSystem fx Profit Driver is a "very powerful employee retention tool," because it enables users to more fully utilize their knowledge, increase their value to clients, and expand their professional opportunities.

"With Profit Driver, all of a sudden firms have the ability to provide their employees with work that is not only interesting, but also innovative. It allows them to experience a whole new way of helping clients."

– **Andre Gien, CBIZ, Director Strategic Consulting**