

Optimally Business Performance

We bring enterprise-level Business Process Automation to small and medium sized businesses, with no need for internal IT resources. Designed to remove manual processes, saving time, increasing productivity, reducing errors, and enabling growth. Billed on a monthly basis AFTER implementation - a truly risk-free path to enhanced efficiency and scalability!

Explore how our cutting-edge Business Process Automations can streamline your processes, boost productivity, and drive success.

Our team of experts is ready to provide tailored solutions to help achieve your goals!

Streamlining External Data Gathering for an Accounting Service

Optimally recently collaborated with an Accounting Service catering to a diverse portfolio of over 50 clients. This service was tasked with producing monthly reports for each client, a process that involved downloading multiple reports from an accounting system and then consolidating, analyzing, and presenting the data.

Client Challenges:

The client dealt with a manual process that was laborious, prone to errors, and necessitated the recruitment of additional personnel. Furthermore, tracking month-end progress proved challenging due to the manual spreadsheet updates required from employees.

Pain Points Addressed:

1. RESOURCE-INTENSIVE PROCESS:

The manual nature of data extraction, aggregation, and analysis demanded significant time and effort, requiring the firm to hire additional employees to meet client demands.

2. LACK OF VISIBILITY:

Tracking month-end progress was a cumbersome endeavor, with employees having to manually update spreadsheets, making it difficult for the company to have real-time insight into their operations.

Optimally Solutions



AUTOMATED TASK SYSTEM:

Optimally created an automated process that included a task system. The process extracted data for each client, performed the standard aggregations and calculations, and placed the file in the desired location.



IMPROVED VISIBILITY:

Notifications were sent to let each employee know when their client's data was complete.



ACCURATE MONTHLY REPORTING:

Reports were created that allowed management to know the status of each client within their month-end process.

Results

Overall, the custom automation was a success for the Accounting Service. It improved their efficiency, accuracy, and visibility, ultimately facilitating the expansion of their business. Additionally, as they add more clients, the automation can easily adapt to accommodate the increased workload.