

FinGenie

We Fix Your Cash Flow

FinGenie

Using FinGenie

FinGenie is a business improvement methodology which combines software with advisory and training to bring success to small and medium business through their trusted accountants.

In short, FinGenie is a forecasting tool which enables you to project the future of your business and use advisory or training services to implement the actionable changes.



How Does it Work?

The software is activated by inputting key numbers from the annual financial statements. Steps 1, 2 and 3 describe the process.

1. Capture the data

2. Set new Goals

3. Determine the Action Plan and Monitor Progress

The software will highlight the potential of the business and will reveal the improvement in the metrics, including by how much the valuation and cash flow have grown.

Imagine if you could achieve your goals and improve your business!

How Does FinGenie Provide Solutions?

1. Accountants

In today's very difficult economic environment clients want services which add value and the FinGenie software allows them to set actionable targets resulting in positive changes to business outcomes. Clients want solutions that provide them with valuable insights and practical fixes resulting in success for their businesses.

FinGenie makes it incredibly easy to capture the interest of your clients by illustrating their future business success. Through deciphering and unmasking financial statements into uncomplicated and actionable metrics, FinGenie assists your clients to appreciate and comprehend their business, motivating them to succeed.

FinGenie provides Accountants with a powerful methodology to introduce Advisory

Most accountants have an advisory section within their business and FinGenie can positively influence revenues generated through this avenue. FinGenie provides the perfect platform from which to launch or add to your current offering. FinGenie is so easy to use that within a few minutes of capturing the data, the software can be applied to reveal the explosive impact to the business that simple implementable changes can make.

FinGenie provides your client with a simple structure and easy to use plan, whilst the monthly monitoring enables them to see progress and implement recommendations. The accountant will provide the client with all the necessary advice to ensure that the suggested changes are carried out successfully. It is a great tool to work with, providing the accountant with an innovative action plan they can utilise to establish a thriving and successful advisory practice.

2. Small to Medium Businesses

Business owners create businesses to achieve their dreams and aspirations. Besides earning income from the business, the owners want to grow the business to the extent that they can sell it at a large profit someday. FinGenie gives you the business owner the opportunity to create that better business. It interprets performance and projects what the business could look like. You can see the potential value you are working towards, as well as the much-improved cash the business can generate by achieving these targets. It also solves a huge problem for small business being that of understanding how cash flow works.

The process of using the FinGenie methodology for small to medium businesses is simple:

- Capture the data.
- Look at the performance metrics, determine weak areas, and identify opportunities for improvement.
- Set realistic and achievable targets using the FinGenie Dashboard and seeing the magic of change.
- Monitor monthly progress toward achieving the set targets.
- Get advisory services from your accountant/advisor or join the FinGenie Coaching Program.