

Track the health of your business with Insights

Make sense of the business and customer stories buried in your accounting data.

Empower your team and your business with information you already have to make better business decisions. Get a complete picture of the health of your business with the automated, intelligent and statistics-packed analytics of Insights.

Keep a pulse on your business

Quickly see your company's performance and KPI trends with the Insights dashboard that proactively:

- ✓ Analyzes data, keeping tabs on your KPIs, like customer lifetime value (LTV), sales trends, concentration risk, product pricing and collections performance.
- ✓ Alerts you to potential issues before they become a problem.
- ✓ Gives you recommended actions to take based on automated client segmentation and advanced analytics of your own sales data.



Clients

5 of 160 Clients Connected

Table View: All Clients

<input type="checkbox"/>	Treutel and Sons	⚠ Don't Lose Them
<input type="checkbox"/>	Tremblay Group	★ Champion
<input type="checkbox"/>	Thiel, Haag and Bauch	♥ Good
<input type="checkbox"/>	Wiza - Rau	🚫 New - Limited Data
<input type="checkbox"/>	Strosin Inc	🔌 Hibernating
<input type="checkbox"/>	Stoltenberg Inc	⚖ Possible Mismatch
<input type="checkbox"/>	Stanton - Bauch	🕒 Late Payer

Understand your clients better

Easily take the guesswork out of where to focus your efforts with automated client segmentation. Insights instantly:

- ✓ Uncovers your best (and worst) clients.
- ✓ Flags those at risk for churn.
- ✓ Identifies clients who are a possible mismatch for your services.
- ✓ Provides recommended actions to take—including prioritization of effort—based on clients' purchasing behaviors, customer LTV, payment history and risk profile.

insights

Streamline collections and receive payments faster

Effortlessly review collection performance and target inefficient payers with our collection effectiveness tracking and prioritized invoices list.

Insights helps you:

- ✓ Optimize cash flow by tracking collection performance over time and take swift action if your collection effectiveness drops.
- ✓ Streamline collection efforts and know where to start with automatically prioritized invoices list.
- ✓ Prioritize the customers that need credit limits or payment terms adjusted based on past payment performance.

Collection Effectiveness

Your collection effectiveness is at **38%**. Anything at or below 50% indicates a serious problem with your collection process.

Action Items: Prioritize which clients and invoices are worth targeting first for collection. [View prioritized invoices.](#)



Stale Pricing

For monthly-billed services, **\$161,287.50 (8%)** of your total annual revenue hasn't had a price increase in the past 12 months. If you're not raising prices regularly, you're losing money. [View clients with stale pricing](#)

Pricing Forecast

If you adjust prices for inflation by 6.5 %, your annual revenue will increase by **\$10,483.69**

Grow revenue and improve profitability

Directly understand how to increase revenue and improve profitability with the stale pricing feature. Insights will:

- ✓ Automatically surface and prioritize which clients and services haven't had price increases in over a year.
- ✓ Show how much your annual revenue would increase if you adjusted prices to account for inflation.
- ✓ Identify the clients and services where a price increase would significantly impact your bottom line.

Change the way you see your business

Gain insights. Be empowered to take action. Create the business of your dreams. Start tracking the health of your business today!

Get started here: rootworks.com/insights