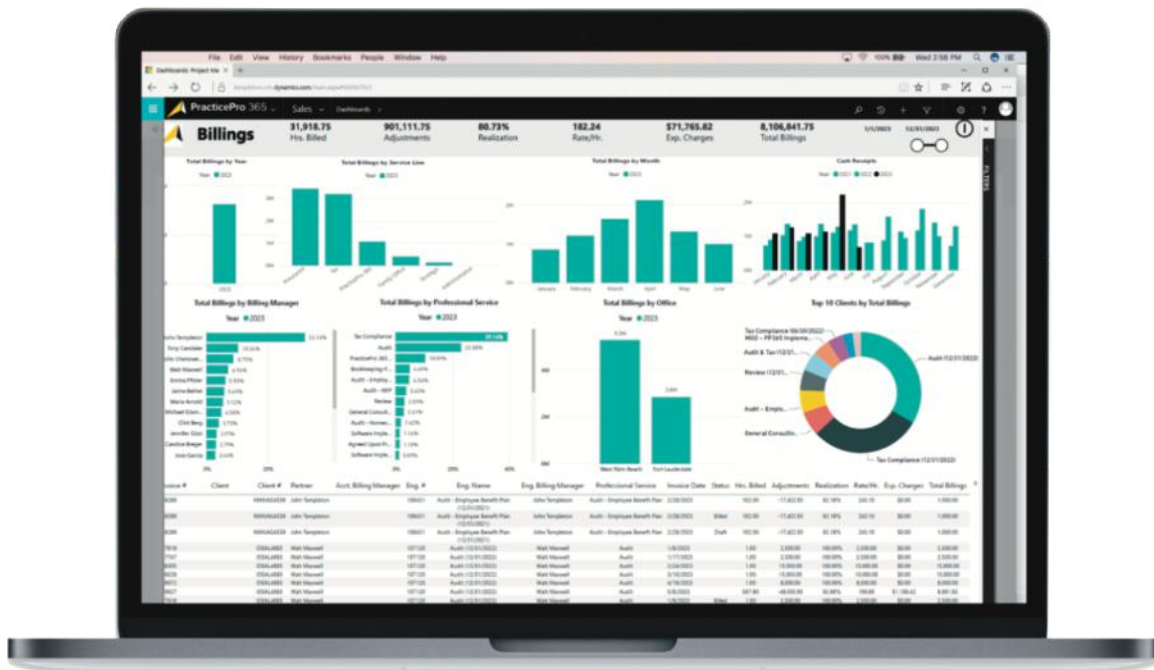




# PracticePro 365™

▶ The Leading All-Inclusive Practice Management Software for Accounting Firms

*Making the Complex Simple*



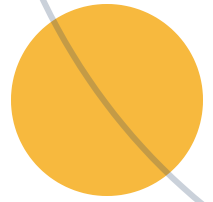
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[practicepro365.com](http://practicepro365.com)



# Welcome To PracticePro 365™



“PracticePro 365 was created by veteran entrepreneurs with over 30 years of experience in the accounting industry. Like many of our customers, we have and continue to face the unique challenges that come with scaling a successful business in an ever-changing industry landscape.

For the last decade, we’ve been on a journey developing technology with a single goal in mind—to help you serve your clients better and be more profitable.”



**Steve Templeton**  
FOUNDER & CEO

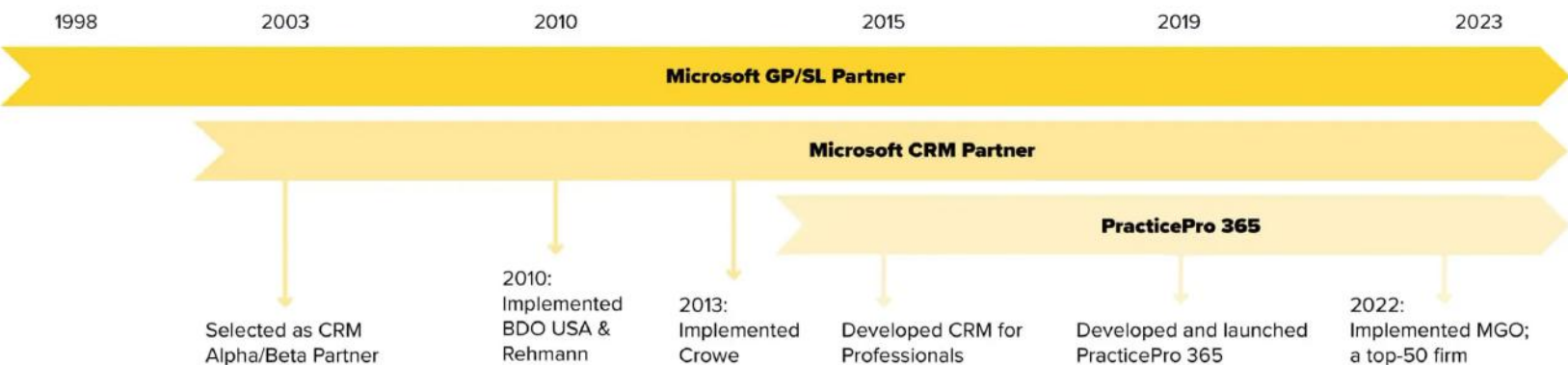


# ▶ ABOUT

PracticePro 365 was specifically designed by a multi-office accounting firm to enable CPA firms to gain ultimate efficiency by eliminating disparate software systems and data redundancies. Leveraging the leading Microsoft Dynamics 365 and Power Platform, PracticePro 365 streamlines operations, improves efficiency, reduces cost and increases revenue.

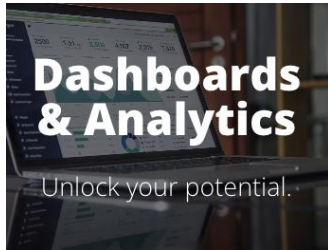
- ✔ **Faster Growth.** With native CRM capabilities baked in to the platform, PracticePro 365 enables you to collaborate on new business opportunities across service lines and manage client accounts—all within the same system.
- ✔ **Smarter Work Platform.** PracticePro 365 captures prospect and client data; time and expense entries; project management; quick and powerful billing and workflows in a single system. As a unified, automated solution, PracticePro 365 provides a single source of truth and one system through which to act.
- ✔ **Unlimited Data Customization.** PracticePro 365 provides a wide variety of business reporting and customizable dashboards so you can readily make data-driven decisions.

## ▶ PracticePro 365 Timeline

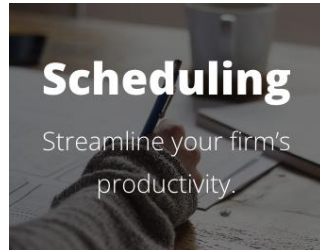


# ▶ The 10 Core Features of PracticePro 365

All-Inclusive | Real-time dashboards | Cloud-based



**Dashboards & Analytics**  
Unlock your potential.



**Scheduling**  
Streamline your firm's productivity.



**CRM**  
Always be growing your business.



**Billing & Collections**  
Increase Profitability.



**Expense Management**  
Effortless control and tracking.



**Tax Workflow**  
Never lose focus.



**Time Entry**  
Anywhere. Anytime. No matter where your employees are.



**Project Management**  
Success simplified.

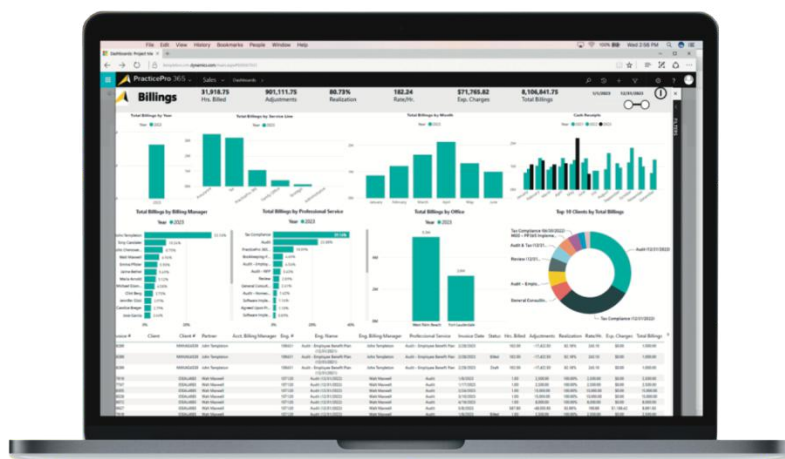


**Engagement Letter Automation**  
Streamline communications.



**Budgeting & Forecasting**  
Empowering your business with precision.

Access anywhere at any time on your computer, laptop, tablet, and smartphone



# ▶ M&A and Private Equity Success with PracticePro 365

## For Firms Seeking to be Acquired, or to Grow by Acquiring (M&A), and for Private Equity Investors, a Unified Cloud-Based Platform can be the Key to Success

*PracticePro 365's unified cloud-based system can play an essential role in the success of mergers and PE partnerships. A disparate legacy system environment is simply not conducive to effectively putting capital infusion to work in growing firms and creating the ROI PE investors are seeking.*

- ✔ **Unmatched Scalability & Flexibility.** Existing systems can be costly to integrate, update, and expand, especially when merging with another entity. Worse, limitations of legacy systems can slow or stop mergers in their tracks. PracticePro 365 offers flexible, scalable options that are well-suited for growing firms, such as adding more users and licenses to accommodate new employees, consolidating data into a single source, providing more data storage, and adding new capabilities for processes and new lines of business. Plus, technology changes more rapidly every day, often requiring firms to make significant investments in automation, analytics, and mobility—all of which are "baked in" to PracticePro 365.
- ✔ **Boost Bottom-Line Results with Cost Savings.** When PracticePro 365 replaces many disparate systems and their related monthly per user costs with its all-in-one solution, those savings result in a tangible improvement to the bottom line.
- ✔ **Gain Real-Time Actionable Insights.** In a typical unintegrated environment, even basic questions can trigger a chain of time-consuming calls and emails, as back-office personnel gather data, analyze it, reconcile the numbers, and re-run reports. PracticePro 365 allows leadership or investors to instantly see why a particular segment of the business is performing a certain way, or even how someone came up with a number, without the finance team scrambling to figure out what's going on.

# WHAT OUR CLIENTS SAY ABOUT US



"MGO was searching for an all-in-one practice management solution. We chose and implemented PracticePro 365, the secure, cloud-based platform, to seamlessly manage client relationships, unify disparate software, and drive our growing practice."

▶ **Kevin O'Connell, MGO**



"We do not look for software. We look for solutions. Our decision to work with PracticePro 365 was in our alignment as a partnership. We are better together, and that is what stands at the foundation of any of the strategic relationships we work to create."

▶ **Michael Miller, MGA**

## ► Questions & Answers

### **What are the advantages of having a cloud-based practice management software?**

PracticePro 365, a cloud-based platform, offers flexible, scalable options that are well-suited for growing firms -- including data consolidation into a single source, adding more users and licenses to accommodate new employees, providing more data storage, and adding new capabilities for processes and new lines of business. Technology changes at the speed of lightning, resulting in potentially large investments to keep up with improvements in automation, analytics, and mobility -- all of which are already included in PracticePro 365.

### **What are the key benefits that set PracticePro 365 apart?**

PracticePro 365 differentiates itself in the marketplace by enabling you to do everything in one system based on real-time information. Bills can be sent out in minutes using daily time entries, instead of waiting until month end or period end. Further, everything is tracked and accessible. Information, such as the engagement start date, estimated cost, the billing manager, engagement manager, invoice due date, and client contact information, all roll from process to process throughout the cash-flow cycle. With little lag, fewer human errors, and real-time insights, PracticePro 365 gives you everything you need to get paid faster.

### **Why would an accounting firm want to implement PracticePro 365?**

PracticePro 365 delivers the integrated data and real-time visibility you need to take your business to the next level. As an all-inclusive system, PracticePro 365 gives you a way to monitor the pulse of your business without the hassle or delays associated with having to pull data from multiple systems. Transitioning from an individual to a firmwide view of business development can help you generate more leads, close more deals, and enhance cross-selling by getting everyone rowing in the same direction.

## ► Questions & Answers

### How has PracticePro 365 enabled the accounting industry's push towards automation?

PracticePro 365 is embedded with dynamic dashboards and analytics to empower clients with data-driven insights. Here are some of the features and benefits our clients say they like the most and so do we:

- ***Gain instant insight into business performance via pre-packaged dashboards in key categories.*** Through user-friendly visual representations, you can easily monitor the health of your business by tracking billings, receivables, time entry, work-in-progress, and more.
- ***Run reports based on reliable, real-time data.*** PracticePro 365 offers robust business-intelligence (BI) reporting capabilities. From staff utilization to win rates, you can empower users at every level with the data-driven insight they need to make better decisions.
- ***Dive into the details with interactive query capabilities.*** PracticePro 365 is flexible so you can manipulate your own data. A subscription comes with several pre-packaged queries to get you started, but you can readily create any type of queries that you want and drill down into the transactional data to gain additional insight.
- ***Customize reports and dashboards to meet your needs.*** The Microsoft PowerBI capabilities embedded into PracticePro 365 are easy to use, enabling you to customize reports and dashboards on your own. For instance, you could create a staff dashboard that allows each associate to only see their own time entry, billable hours, etc., while keeping everyone else's information private.



# MARKETING MESSAGING

The future is here with PracticePro 365 - the superior ALL-in-ONE practice management software tailored for CPA firms.



**Time to Ditch your Broken Ride! UPGRADE to PracticePro 365!**

practicepro365.com

[Learn more](#)

Save time and money with PracticePro 365 - the superior all-in-one cloud-based practice management solution.



## PracticePro 365™ THE ALL-IN-ONE PRACTICE MANAGEMENT SOLUTION

"Our vision is to continue our rapid expansion on the scalable PracticePro 365 platform while optimizing the efficiencies we glean from its flexibility."

**Kevin O'Connell, CPA**  
CEO & Managing Partner, MGO

**Get your FREE No-Obligation Demo NOW!**

[Learn more](#)

# MARKETING MESSAGING

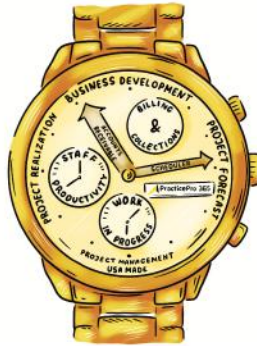
Is the future of your firm at the mercy of a hodgepodge of software systems?



Don't you **deserve** the ability to improve productivity, grow revenue, streamline projects, and so much more?

It's time to upgrade to **PracticePro 365™**

Your all-in-one superior cloud-based practice management software solution.



Schedule your free no-obligation demo today and discover the possibilities

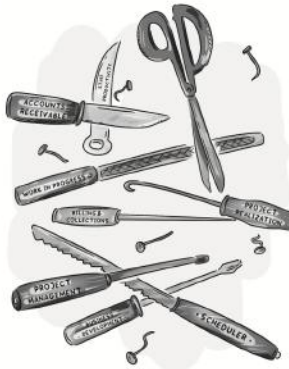
[www.practicepro365.com](http://www.practicepro365.com)



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Ready to replace your firm's lackluster mishmash of practice management tools?



**Upgrade to PracticePro 365™**

Your all-in-one superior, cloud-based practice management solution



Including:

- Accounts Receivable
- Billing & Collections
- Scheduler
- Staff Productivity
- Project Realization
- Work in Progress
- Project Management
- Project Forecast
- Business Development

Schedule your free no-obligation demo today and discover the possibilities

[www.practicepro365.com](http://www.practicepro365.com)



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# MARKETING MESSAGING

## It's time to let go...

Over the years, your firm continuously upgraded—matrix printers, rotary phones, pagers, typewriters, fax machines, huge calculators, Windows® XP were all updated or left behind.



So why cling to an inefficient hodgepodge of software systems for managing your practice?



## Upgrade to PracticePro 365™

Your superior practice management solution

All-in-one | Real-time dashboards |  
Cloud-based | Remote-ready |

Access anywhere on your computer, laptop, tablet and smartphone

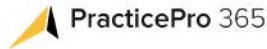


### All-in-one including:

- Accounts Receivable
- Billing & Collections
- Scheduler
- Staff Productivity
- Project Realization
- Work in Progress
- Project Management
- Project Forecast
- Business Development

Discover your future, schedule your free no-obligation demo

[www.practicepro365.com](http://www.practicepro365.com)



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## Need a Change?

Is your cobbled-together practice management system holding your firm back?



## Upgrade to PracticePro 365

The superior all-in-one practice management solution.



### Including:

- Accounts Receivable
- Billing & Collections
- Scheduler
- Staff Productivity
- Project Realization
- Work in Progress
- Project Management
- Project Forecast
- Business Development

Schedule your "test drive" today!

For your FREE no obligation demo visit [practicepro365.com](http://practicepro365.com)



# INDUSTRY RECOGNITION

PracticePro 365 Consistently Ranks as a Top 100  
VAR by Accounting Today

Why PracticePro 365's Unified, Cloud-Based Platform  
is Key to Merger and Private Equity Success

Accounting Today: Software Survey: Staying in touch  
with CRM

Inside Public Accounting: Product Release



# KEY CONTACTS



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FOUNDER & CEO

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## Our Socials

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