

Case Study: Outbased

Clinked allows us to efficiently process our clients accounts ensuring we deliver, track, analyse and report financial information - so our clients always know their numbers.

Vital statistics

Outbased deliver a revolutionary accounting product that reaches beyond payroll, tax returns and bookkeeping to ensure businesses understand their financial information. Central to Outbased's strategy is delivering easy to understand financial statistics and statements so that businesses can make confident and informed decisions as challenges and opportunities are presented. Exceptional client communication plays a key role in delivering a tailored analysis to each client.

The pain

With vast amounts of confidential financial and personal staff data being circulated, amended, shared and stored, using email and hundreds of LeverArch folders was not ideal. Outbased needed to provide highly secure storage for myriad files and documents, provide on-demand access for their clients' financial data and other compliance documents as well as manage and organise ongoing collaboration between their clients, third party organisations such as tax authorities and the clients' staff and stakeholders.

Of key importance was security as a vast amount of the data and documents were highly sensitive such as payroll, profit and loss accounts and tax information. The other crucial factor was to ensure Outbased and their clients could communicate on, upload, edit and download files and folders as well as ensuring swift responses and approvals in order to meet relevant deadlines for compliance purposes. Functionality such as version control, task and event assignments to meet deadlines and sign-off requests were all needed for the exceptional level of customer and client care and communication Outbased aimed to offer.

The solution

Discovering Clinked as a white-label client portal has been a huge relief. Outbased manages to represent their own brand and corporate identity in their own highly secure client portal hosted on their website. Clinked ticks all the boxes in terms of secure file sharing, discussions and collaboration on documents within the portal, a comprehensive audit trail and version control function on all files and folders as well as the added benefit of task and event management which Outbased can use to manage and organise document sign offs, meet deadlines and engage several team or client members on one or many files or folders, all hosted in one central portal.

Simon Lee Outbased's Founder said, "The latest technology allows us to efficiently process our clients accounts ensuring we deliver, track, analyse and report financial information – so our clients always know their numbers. Collaboration is core to Outbased's strategy, ensuring succinct communication with our clients and Clinked delivers the efficiency that is central to our business. As a team, Clinked has further improved our internal processes, and with a huge capacity for storage and bank grade security, Clinked have exceeded our expectations in a white label collaborative portal."

- Through Clinked, Outbased deliver monthly management reporting to their clients, organised in such a way that clients have all historical data to hand too.
- Notes are set up with all important data, making finding VAT reference numbers, or HMRC log in details quick and easy and in one place
- Tasks are set up to remind clients when information is due such as monthly payroll hours to be paid

Relief

When looking for a viable solution Outbased looked at Huddle which they felt was too complex and expensive, they also looked at Dropbox and others, which were more consumer focused and far too generic, plus mainly file management solutions. Finally they discovered Clinked and the 'Goldie-locks' effect won them over.

Clinked is 'just right', it offers secure file sharing, collaboration for external clients as well as internally within their business and project management on tasks and events, all accessible anywhere and by any chosen group members. Easy to use and bank grade secure.

The other benefit to Outbased is the pay monthly option, meaning as they grow their client base they can increase user members on a monthly basis with no minimum contract or lengthy tie-ins. Clinked has provided the perfect solution for improved communication and efficient information gathering, sharing and storage.

