



Shortest Path to Customer Centricity.

Intuit Leverages CoVia's Technology Platform to Provide Web-Based Services to Professional Accountants

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Intuit Leverages CoVia's Extended Relationship Management Technology Platform to Offer Web-Based Services to Professional Accountants

Accountants are empowered to manage and grow their businesses more effectively, enhance and retain client relationships and deliver improved, expanded year-round services.

About Intuit

Intuit Inc. (NASDAQ: INTU) is the leader in e-finance, including financial software and Web-based financial services for consumers and small businesses. Intuit develops and markets Quicken[®], the leading personal finance software, TurboTax[®], the best-selling tax preparation software, and QuickBooks[®], the most popular small business accounting software. An innovator in delivering Web-based financial tools, Intuit is also a leader in providing consumer online tax preparation and tax return filing, payroll processing and online mortgages. Intuit is also breaking new ground as a leader in online bill presentment and payment.

The company's IntuitAdvisor program builds partnerships with professional accountants while providing a single, cohesive solution that integrates a broad range of accounting products and services. IntuitAdvisor's vision is to provide professional accountants with opportunities to better serve existing clients, acquire new clients, grow their practice, and earn incremental revenue.

"Intuit's mission is to revolutionize the world of small business and personal finance. Whether our customers are individuals or small business owners, we work to understand their problems and solve them. By providing simple financial tools, we give people more time to enjoy life. For small business owners, we solve the complexity of the business behind the business, freeing them to devote more time to their customers."

Steve Bennett
President and Chief Executive Officer, Intuit

Business Challenge

Enhance and maintain Intuit's position as an online solutions provider for professional accountants. Establish a powerful Web-based solution that equips accountants with online tools to better manage documents, files and information, help generate additional revenue and improve communication between accountants, their staff and clients while optimizing support, performance and reliability.

Business Background

Intuit operates a number of leading financial Web sites that offer a comprehensive set of tools, news and information about finance, insurance, mortgage, investment and tax preparation services. In particular, IntuitAdvisor programs help financial professionals provide their clients with extra services such as financial news, investment information, specialized forms, financial calculators and interactive software that are more closely related to specific clients' business activities and investment goals.

Direct communication between professional accountants and their clients most often occurs during the tax-filing season. Although accountants enthusiastically embrace the computer age, they still find themselves challenged with cumbersome paper-based tasks related to the distribution, storage and management of large amounts of paper files, folders, receipts, reports and other information. Additionally, accountants' revenues are traditionally based on billable hours for standard tax and accounting services.

Defining the Solution

Within this context, Intuit's professional accountant-focused business unit was tasked with an initiative to deliver scalable, feature-rich "digital office" capabilities for professional accountants that could be quickly launched and easily maintained.

Steve Blundell, vice president and general manager of Intuit's Intuit Advisor Group, envisioned a suite of collaborative Web-based workplace applications and services to offer to Intuit's professional accounting customers. Blundell, a former partner with a CPA firm, was personally familiar with the business culture and philosophy of accountants. He knew that a great number of accounting firms were locally headquartered and concentrated on serving a local clientele during normal daytime business hours.

For Intuit, this represented an opportunity to help its clients build their businesses and improve revenues by expanding their breadth of services and effective hours of availability. With Intuit's successful track record in employing the Internet to enhance its own business model, Blundell sensed that local accounting firms could also improve their operations and client communications by deploying customized, client-focused Web sites that would establish a distinct marketing identity and competitive online presence.

"These are very analytical, results-oriented professionals who traditionally don't consider themselves marketers or salespeople," Blundell explained. "They just want to provide a superior service, be paid for their services, and receive referrals from satisfied customers."

Blundell searched for development resources to create an infrastructure that could be managed by Intuit and offered to its existing customer base of professional accountants. Armed with a wish list of applications and hosted services that would allow accountants to (i) manage their businesses more effectively, (ii) attract and retain new clients, and (iii) generate a reliable stream of year-round revenue, Blundell evaluated a number of software development options.

"We knew that CoVia was a leader in business-to-business collaborative commerce and enterprise portal solutions. We decided they would be an excellent partner to work with to develop the applications we had envisioned," Blundell said. "We were pleasantly surprised to discover that their existing portal technologies, interactive customer relationship management applications, project collaboration tools and intranet-based solutions already provided 85 percent of what we were looking for, right out of the box."

IntuitAdvisor.com and IntuitAdvisor WorkSpace Pro

The Intuit / CoVia team focused on delivering functions that would be appropriate for the tax accounting business environment. The result of the collaborative development effort

between Intuit and CoVia was deployed as an online resource branded as *IntuitAdvisor.com* and a "digital office" branded as *IntuitAdvisor WorkSpace Pro*.

CoVia's multi-tier connection technology gave Intuit the power to offer new Web-based services and applications to Intuit's professional accountant subscribers and, in turn, provide accountants with the power to extend Web-based applications and services to their clients. The IntuitAdvisor WorkSpace Pro digital office offers a powerful suite of Web-based applications that enable accountants to create their own digital offices and be open for business across industry lines as well as time zones. Clients and colleagues need only a standard Web browser and an Internet connection to access the available resources.

Accounting firms that subscribe to IntuitAdvisor WorkSpace Pro can also use the tool to create their own fully functional intranet. As a company-wide workflow management tool, IntuitAdvisor WorkSpace Pro allows employees of an accounting firm to search and view files through an online document management system, collaborate with co-workers, conduct discussions and control information access to and from clients. IntuitAdvisor WorkSpace Pro users can also access up-to-date tax and financial news, conduct research and post documents to be shared and viewed online.

Improve Communication

"Intuit wanted an infrastructure that would enable accountants to communicate one-to-one with their clients on a 24/7 basis," Kirk Crenshaw, CoVia, Director of Business Development, said. "We were able to deliver that and more with WorkSpace Pro, a revolutionary Web-based communication and document management system that brings accounting staff members together within their core business operation to create a more efficient, digitally communicative environment."

WorkSpace Pro incorporates the capabilities of CoVia's *Private Client Sites* technology to enable accountants to set up a personal Internet window for each of their clients. Through these individual client sites, information and documents can be exchanged between accountants and clients. Tax returns, receipts, financial statements and detailed records can be posted and retrieved quickly and efficiently.

These transactions can occur around the clock. Additionally, accountant-customer interactions are enhanced every time the client logs on to their exclusive, customized Web site.

Extended Product Lines

"Perhaps even more importantly, the Private Client Sites give accountants the opportunity to create additional incremental revenue," Blundell explained. "Instead of meeting with a client on rare occasions and providing only software and system upgrades, accountants can now offer additional services and deliver a vast selection of content and resources online. It's an exceptional capability."

CoVia's architecture facilitates simple site maintenance, not requiring extensive Web experience for those who administer IntuitAdvisor sites. Similarly, accountants and their staff members who manage private client sites don't need any special technical skills to

publish content or manage document routing, review cycles, version histories and staging areas. Plus, they are able to preview precisely how their private client sites will appear.

Specific, Targeted Functionality Creates Satisfied Customers

"IntuitAdvisor makes it possible for professional accountants to transition from a paper-based filing and faxing routine to a more efficient electronic process with the power to expand client relationships and increase revenue opportunities," Intuit's Steve Blundell explained. "CoVia's collaborative commerce technology platform is well suited for these professionals, since it's designed to provide context-specific support for the complexity of real-world business relationships."

Intuit and CoVia created IntuitAdvisor's online resources especially for small- to mid-sized accounting and financial service firms, empowering them to create their own digital offices easily and cost-effectively. Internet access allows users to collaborate and share data to communicate with both co-workers and clients anytime and anywhere.

"Our work with CoVia was one of shared vision and execution," Blundell added. "From CoVia's senior management all the way to the people who worked with our team to create these robust financial applications and resources, this was an excellent working relationship. It's a very difficult undertaking to build and launch a widely scaleable Web-based service like this. CoVia had a flexible, receptive professional attitude and delivered a comprehensive technology solution."