



Company: **Rulien + Associates, LLC**
Location: **Anchorage, AK**
Size: **9 Employees**
Liscio Since: **August 2017**

About Rulien + Associates

We specialize in back-office support (bookkeeping and payroll), corporate/LLC tax returns, and individual tax returns.



Katelyn Senn
Managing Member

BEFORE Liscio

- Buggy portals with a confusing mobile experience.
- Customer requests siloed & buried in email.
- Engagement letter paperwork.

WITH Liscio

- Delightfully designed UI that clients love using.
- Uninterrupted customer service with no silos.
- Paperless engagement letters on Mobile App.

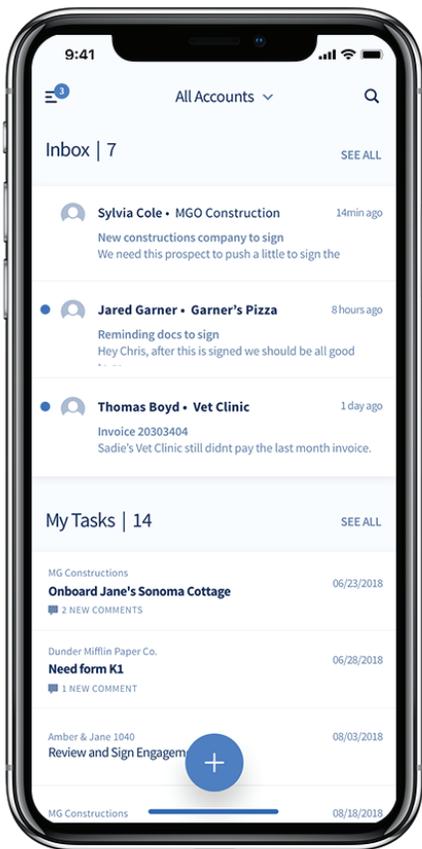
“ Liscio is easy to use, looks great, and most importantly, customers actually enjoy using it. ”

What made you try Liscio?

Several reasons. The biggest being frustration with our current portal system. It wasn't user-friendly. We spent a lot of time just helping customers log in to access tax returns. Customers would get so frustrated having to call us every time the password reset didn't work.

A close second was customer requests getting buried in email inboxes of staff out sick or on vacation. This led to lost requests and customer service lapses. The last

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thing I want as a firm owner is a customer not receiving a response and not getting the best service possible. There were lots of requests to IT for access to out of office staff. And we had to ask clients to resend info to whoever was covering. This wore down my patience daily.

Next was unnecessary engagement letter paperwork. We prided ourselves on being a paperless firm, but we had to make clients print and sign their engagement letter every year. Taking this process online was a frequent request.

Finally, lack of a good mobile app. Customers want us right at their fingertips but the app that came with our portal system wasn't user friendly.

How did Liscio make life easier for you?

Liscio's is easy to use, looks great, and most importantly, customers actually enjoy using it. Customers were so frustrated with our old portal app that they asked why we didn't switch them to Liscio sooner.

Liscio's FirmView dashboard is laid out in a way that makes it impossible to miss client requests. Your entire team gets full visibility and layers of notifications, alerts, and notes to ensure the client never has to repeat or resend anything.

Liscio's Mobile App is so easy to use, if my dog had fingerprints, he could probably use it! And it includes engagement letters.

Liscio solved these issues and so much more. It has become our tool for tracking prospects, all client correspondence, signing engagement letters, and our new delivery system for anything we need to get to a customer. New clients love the fact that we have an app so they can upload files and message us right from their phones.

What advice would you give to firms considering Liscio?

We could probably put together a five-page single spaced document on how much we love Liscio and all it has helped us solve, but let's be honest, no one reads that far. If all you read is this last sentence: make the switch to Liscio now!