

CASE STUDY: ALLIANCE ACCOUNTING GROUP

How Alliance Accounting Group Eliminated Paper-Based Onboarding and Freed Up Partner Time With Digital Automation

CLIENT OVERVIEW

FIRM	SIZE	LOCATION	GOAL
Alliance Accounting Group CPA Inc. Founded in 2017	3 Partners, 20+ Staff	Brandon, MB & Hamiota, MB Canada	Onboarding Automation & Client Experience

The Challenge

A Paper-Based Process That Was Holding the Firm Back

Alliance Accounting had built a strong, trusted firm serving farms, businesses, and individuals across Manitoba. But their client onboarding process hadn't kept pace.

Every new client intake started with paper forms. Clients had to:

- Print the forms
- Fill them out by hand
- Scan them
- Return them to the office

For the Alliance team, collecting and processing paper documents for every new engagement added friction at exactly the wrong moment — when a new client relationship was just getting started.

Strong firm. Cumbersome onboarding process that didn't reflect the quality of service Alliance delivered.

Why RightFit

An Execution Partner, Not a Consultant

Valerie and the Alliance team weren't looking for a plan. They needed someone who would actually do the work — without creating a new burden for the partner group.

They needed a partner who:

- Understood accounting firm operations
- Could build digital solutions tailored to their firm
- Would respond quickly and stay easy to work with
- Could keep improving systems as the firm's needs evolved

RightFit's Automation Framework was built for exactly this kind of challenge: taking manual, time-consuming processes and replacing them with streamlined digital systems — without requiring partners to manage the implementation.

RightFit gave Alliance the execution support they needed — fast, responsive, and done for them.

THE RIGHTFIT APPROACH

Digital Onboarding Automation	Website Rebuild	Communication Framework
Converted all paper intake forms into digital forms clients can access, complete, and submit directly online — no printing, scanning, or mailing required.	Rebuilt the Alliance website to support digital form access and submission, with the ability to add and update forms quickly as the firm's needs evolve.	Currently building a communication structure to systematically market to Alliance's existing client base and expand advisory revenue.

THE RESULTS

Simpler. Faster. Less Work for Everyone.

Once digital onboarding and the rebuilt website were in place, Alliance saw an immediate improvement in both the client experience and internal operations.

Early Results Included:

- Clients complete onboarding fully online — no paper, no scanning, no back-and-forth
- Reduced administrative workload for partners and staff
- Website now functions as an active client resource, not just a digital brochure
- Forms can be added and updated quickly without disrupting the team

BUSINESS IMPACT

- Alliance eliminated a manual, paper-based process that was adding friction for every new client
- The new client experience now reflects the quality of service Alliance is known for
- Partners and staff spend less time processing paperwork and more time serving clients
- The rebuilt website gives Alliance a platform that actively supports how the firm operates
- RightFit's responsiveness means updates happen quickly — no chasing, no delays
- A communication framework is now in development to drive growth from existing clients

What This Means for Other Managing Partners

Alliance's results did not come from overhauling everything at once.

They came from having **the right partner identify the friction, build the fix, and implement it without adding work to the partner group.**

If your firm:

- Still relies on paper forms or manual intake processes
- Wants to improve the new client experience without a major internal project
- Has a website that doesn't actively support how your firm operates
- Needs systems updated quickly without managing a vendor
- Wants to grow revenue from existing clients through better communication

This is exactly the problem RightFit was built to solve.