

Client:	Tanna Partners
Contact:	Greg Tanna
Position:	Managing Director
Client Since:	2004
Services Provided:	CFO Services, Bookkeeping, Accounting, Compliance

“ Your Portal allows me to focus on my core business, thereby capitalising on all revenue producing activities ”



What does Tanna Partners do?

Tanna Partners is a specialist consulting practice supplying Executive Search, Selection & Contracting services to the Enterprise Asia-Pacific Customer Contact industry

How did Tanna Partners operate before working with Your Portal?

I have used Your Portal from inception/incorporation in February 2004 to the present day. In many ways, Your Portal (then “no office”) helped give me the confidence to establish my company given how terrified I was of managing the Finance function, with all its fiduciary responsibilities and liabilities. It was such an incredible luxury to be able to outsource the whole department in effect, giving me my “virtual CFO” to help navigate the complexities and pitfalls of P&Ls, Balance sheets, payroll, tax calculations, BAS, ...the list goes on.

What were your concerns when you first decided to use Your Portal?

I was just wondering if it really did work as seamlessly as was presented to me in the courting stage – it sounded too good to be true. After some initial and quite understandable teething problems, I am happy to report that it really does work!

What have been your good experiences with Your Portal?

Your Portal is excellent value for money. I simply tap into my dedicated Your Portal account thru the net and provide instructions which are immediately confirmed back via email with a receipt number. Once I receive that receipt number, I literally do not worry about the transaction ever again as I know it will appear in the accounts in the right column with appropriate action taken.

Response times from my dedicated Account Manager are excellent – usually within 30 minutes for any query – so there is an immediacy to everything that gives me the sense of confidence that I'm working in real time with all my figures when I request P&Ls, balance sheets, receivables statements and the like.

Customer Service – as an Executive Recruiter in the Customer Service domain, I place high value on superior customer service as the real differentiator for most businesses, and am possibly a hard marker as a result. I find the staff at Your Portal to have a commendable customer service ethic, always willing to assist, often outside the scope of contracted services. Ken Lipschitz is also a vastly experienced senior finance executive with an excellent knowledge of company finance and law that he is always willing to share. I regularly come to him with questions from various tax implications to structuring of company shareholder agreements and his broad knowledge has been of great assistance over the years. I am presently establishing another business as a 50% partnership arrangement and Ken has kindly offered much of his valuable time and commercial wares in ensuring that I make a fully informed decision as to how I should structure such an agreement.

What would you say are the challenges of working with Your Portal now that you are a client? How do these compare with what were your original concerns?

I am a happy customer and would not consider any element of the relationship to be a "challenge." After contracting out the full Finance function to Ken and his loyal team over the course of

the last 7 years, we've fairly well fine-tuned the whole operating relationship. It now delivers what I hoped to receive – minimum amount of hassle, time and worry from my Finance function, allowing me to focus on my core business, thereby maximising/capitalising on all revenue producing activities.

Why would you recommend Your Portal ?

I'd highly recommend Your Portal to any business owner that sees merit in completely outsourcing the often troublesome Finance function. It makes my job easier, saves me money (their model clearly works and the rates are very reasonable) and consequently allows me to spend more time on my core business without distraction. Finance doesn't come naturally to me and the time, energy and worry Your Portal saves me makes them a highly valued supplier.

FACTS

- Our clients report 100% uptime on IT, company websites and their "Your Portal"
- Our clients report phone call costs cut by >70%
- Our clients report making first year savings in excess of \$300,000
- Our clients report back-office expenditure dropped by >30%
- At the time of publication we have 5 recruitment companies as clients

