

CASE STUDY

FROM MANUAL MONTH-END TO AI-POWERED CLIENT REPORTING

Numberwise Accounting has made Joiin part of standard onboarding for **every client it takes on**: an hour of setup, then reporting that refreshes itself.

 **1 hr**

of setup per client, then every month-end rolls forward automatically

 **10**

clients moved onto Joiin packs so far this year

 **20-30**

more clients set to migrate onto Joiin in the next 90 days

CHALLENGE

Polishing financials the old-fashioned way was eating the month: formatting, version sprawl (V1, V2, V3) and a stream of basic client questions before any advisory work could begin. Founder and Fractional CFO Tadd Wooten needed statements that satisfy lenders, auditors and PE groups, without the manual grind.

SOLUTION

Joiin automates the reports, and Numberwise embeds AI inside every pack: live commentary, variance analysis and unlimited Q&A on the client's own numbers. Tadd frames it to clients as "What does your AI CFO have to say?"



"We don't sell Joiin to our customers; we surprise them with it. **It's the secret sauce that keeps them hooked.**"

Tadd Wooten · Founder & Fractional CFO, Numberwise Accounting

BENEFITS

01

The monthly grind is gone

One hour of setup per client eliminates steps at every month-end close, and clients are far more impressed by the service.

02

Clients get answers instantly

Embedded AI handles the questions that used to fill an accountant's week. One client asked: "How did you guys look at that so fast?"

03

Stickier clients, faster growth

Included at no charge, so the reporting clients love only exists at Numberwise. Ten added this year, 20-30 more expected in 90 days.

About Joiin: Group financial reporting and consolidation software for accountants and finance teams. Joiin pulls data straight from Xero, QuickBooks, Sage and more to build consolidated, multi-currency management packs in minutes, with Joiin Intelligence adding AI commentary and Q&A on top.