

IFI Professionals Chooses to Partner with AP Automation Provider Yooz to Drive Growth and Productivity with Multiple Customers

A conversation with Kristina Costello, the Director of Implementation-Accounting Systems, and a 7 year veteran of IFI Professionals.

IFI Professionals, formerly known as Incubator Finance, is an insights-driven financial technology company providing outsourced accounting and business transformation consulting services for small to mid-size organizations. Their success as a Managed Services Provider is built on trusted partnerships that help them to provide best-in-class services to customers that improve their efficiency and flexibility, acting as a catalyst for growth.



Challenge

A crucial area for this evolution can be found in the Accounts Payable (AP) process of the finance function. Knowing this, IFI Professionals began their search for the most robust automation platform that offered full customization according to the different functionalities and needs of their clients, while being easy to use, and easy to implement. **Three main requirements were that the platform be customizable, offer additional functionality, and provide a seamless integration with another key partner, Sage Intacct ERP.**

Kristina recounts the moment that they made their choice: *"I think that the pivotal moment when we knew Yooz was the right AP automation solution for IFI Professionals to partner with was most likely when we were allowed to customize the XML scripts. The Yooz team was completely flexible with us about allowing us to [standardize the API automation] and do what we needed to do [for our workflows], and I think that as soon as that was made clear to us it was a game changer."*



"Yooz is on the leading edge of the transformation of the invoice payment process. A one-stop-shop for the full AP process."

Kristina Costello, Director of Implementation - Accounting Systems

IFI Professional's Partnership with Yooz

Solution

As a managed services provider, IFI Professional's clients trust them to provide the right products and services that deliver the most value for their specific needs. According to Kristina *"We pretty much tell our clients 'Yooz is the best product for [your organization].' And that's because it really is."* Client feedback fully supports this, as they hear *"...clients talk about how they no longer have to walk to the CFO's office to get something signed off on or chase down their approvals anymore"* and know that ***"Yooz helps (the) clients evolve and grow over time."*** She sees the success of Yooz being implemented in the AP process of their clients through their ability to grow and scale. ***"I definitely see that Yooz has been successful for our clients. A lot of the clients that we work with are growing organizations that are able to grow because Yooz is offering automation of more complex approval flows."***

Working with Yooz AP automation, IFI Professional's clients can focus on the core mission of accounting to provide guidance to the CFO and executive leadership and working on value-added tasks like data analysis, predictive reporting, and vendor relationship management. Yooz allows managed service providers like IFI Professionals to better serve their clients and secure lasting relationships.

The Future

Yooz and IFI Professionals have now been partners for over 4 years during which one of the most positive things to Kristina has been that the cloud-based Yooz AP automation solution is that it allows the IFI team, currently remotely located in 18 different states, to keep their AP processes moving without being in the same physical location.

When asked how Kristina envisions the future of automation, finance, and accounting, she stated: *"...our partnership with Yooz is key... We wouldn't have the automation and be ready for the future if it wasn't for Yooz being as advanced as they are today. They're already structured and key to the growth and future of a lot of organizations."*

"I think Yooz is on the leading edge of the transformation of the invoice payment process. A one-stop-shop for the full AP process. The Yooz integration is best-in-class and checks the boxes for organizations globally." Says Kristina



"Yooz has continued to evolve with us which has been fantastic and a sign of a great partnership."

Kristina Costello, Director of Implementation - Accounting Systems