



MYP
perform®

take client engagement + service delivery to the next level

Without systemised and automated processes, advisory services are too often reactive, ad hoc, inefficient and expensive. This undermines the enthusiasm of accountants, consultants and financial planners to deliver advisory services and denies clients the benefits of this advice.

MYP's one-of-a-kind platform is an industry game changer. Its specialised software for advisers provides the infrastructure to deliver targeted end-to-end advisory services and stand-alone solutions to their clients.

step 1: select your advisory modules



ENGAGE CLIENTS + ADD VALUE

Determine clients key personal + business priorities + uncover the gaps to provide relevant, valuable services



COMPREHENSIVE + EFFICIENT BUSINESS PLANNING

An all-in-one process that prepares a diagnostic, gap analysis, benchmarking report + operating plan



FINANCIAL + KPI BENCHMARKING

Assess financial performance + improve decision making with realtime benchmarking + KPIs



CLIENT, CUSTOMER, STAFF + MEMBER SURVEYS

Leverage mobile friendly surveys + year-on-year industry comparison to identify your client's opportunities for improvement + build an action plan

step 2: select your business management modules



CRM, PROJECTS + INFORMATION HUB

Manage leads, client activity, sales + communications, projects, forms + documents all in one place, integrates with other MYP modules



EMAIL CAMPAIGNS, MARKETING + EVENTS

Create + send responsive email campaigns, manage your events + broadcast digital forms



DIGITISE + AUTOMATE FORMS, SURVEYS + REPORTS

Build professional online forms to automate business systems, leverage information + conduct surveys, now with digital signatures



ACCESS + MANAGE DOCUMENTS EFFICIENTLY

Retrieve + edit documents where + when you need them, provide client portal access + auto-version documents



HR SOLUTION, MANAGES TEAM + PERFORMANCE

Streamline HR management to improve staff + operational efficiencies, engagement + performance



ROSTER YOUR PEOPLE + RESOURCES

Efficiently manage rosters, timesheets, assets + resources while simplifying complex award rules



INTEGRATE YOUR WEBSITE WITH YOUR MYP PLATFORM

Connect your website + contacts with your systems, eliminate data entry + maximise opportunity



GOT AN IDEA? BRING YOUR INNOVATIONS TO LIFE

Customise the MYP platform for your own unique requirements or commercialise your idea in the MYP Marketplace