

Neidenthal & Co. Leverages Vertical IQ for Enhanced Client Responiveness and Competitive Advantage



- Matt Neidenthal, president and founder of accounting and advisory firm Neidenthal & Co., is dedicated to providing his clients with comprehensive financial services, including tax, retirement plan consulting, financial consulting, and valuation services.

Matt's commitment to client satisfaction and a continuous pursuit of relevant industry information led him to discover Vertical IQ, a tool that has significantly enhanced his firm's ability to deliver timely and impactful insights.

THE CHALLENGE

Before integrating Vertical IQ, Matt, like many professionals in the financial advisory space, faced challenges in efficiently gathering comprehensive industry information. While he had previously relied on various resources for valuation work, these methods often proved time-consuming and lacked the consolidated, digestible format he desired.

The process of searching for specific industry data to prepare for new client meetings or provide benchmarking insights to existing clients was inefficient, hindering his firm's ability to offer immediate and data-backed responses. Furthermore, the valuation portion of his previous industry research resources was not always available on mobile devices, which was a clear shortcoming for his on-the-go needs.

Matt needed a solution that could provide quick, convenient access to relevant Industry Intelligence without the extensive time commitment of traditional research.

THE SOLUTION

Matt discovered Vertical IQ through a relationship with ADP after transitioning his firm's payroll system. Intrigued by the initial information he found on Vertical IQ, he opted for a full subscription to gain comprehensive access. Matt then strategically integrated Vertical IQ into his workflow, leveraging its features to address his firm's needs for Industry Intelligence and client engagement.

New client meetings: For new clients, especially those in unfamiliar industries, Matt uses Vertical IQ's Call Prep Questions and Current Conditions features. These tools allow him to quickly develop targeted questions and understand the industry-specific issues relevant to a business owner.

Current client benchmarking: He utilizes the Financial Benchmarks data to compare the performance of his client's company against industry averages, providing them with valuable context and actionable insights.

Efficiency and accessibility: Vertical IQ provides the latest conditions within a niche, as well as background information on the industry, saving time while boosting relevance and reliability. This ready-access enables Neidenthal & Co. to be more agile and responsive to client inquiries.

On-the-go mobile access: Available anytime, anywhere, the Vertical IQ mobile app is loaded with industry insights that can be accessed on Matt's smartphone, allowing him to quickly reference information even when he's out of the office.

RESULT

The implementation of Vertical IQ has yielded several key benefits for Matt Neidenthal and his firm:

Enhanced responsiveness: Vertical IQ directly supports Neidenthal & Co.'s core competitive advantage: speed and responsiveness. Matt can now quickly access industry-specific data to answer client questions on the spot, significantly reducing research time while ensuring data accuracy.

Improved client conversations: By having immediate access to industry-specific insights, Matt can engage in deeper, more informed discussions with both prospective and existing clients, making them feel "heard and understood."

Streamlined information-gathering:

The Vertical IQ platform offers Matt and his team a more efficient workflow by consolidating information that previously required reviewing and analyzing multiple websites and resources.

Validated third-party data source:

Vertical IQ uses data from reliable third-party sources, similar to those Matt previously relied on for valuation data, providing Matt with confidence in the information's accuracy and reliability.

CONCLUSION

Vertical IQ has proven it to be an invaluable asset to Matt Neidenthal and his team at Neidenthal & Co., significantly enhancing their operational efficiency and client service capabilities. By providing streamlined access to comprehensive and reliable Industry Intelligence, Vertical IQ empowers the firm to deliver swift, data-driven insights.

This strategic adoption not only solidifies Neidenthal & Co.'s competitive advantage in speed and responsiveness but also deepens client trust and engagement, enabling more productive and informed financial advisory conversations.



**OUR SUCCESSES ARE ALWAYS
CO-AUTHORED WITH OUR CUSTOMERS.**

TO LEARN MORE ABOUT HOW VERTICAL IQ CAN GIVE
YOUR TEAM AN EDGE, CONTACT US AT 919.787.4600
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