



# Full-Service Breakdown Brochure

## ABOUT US

FinanceArix helps SME's turn financial and operational mess into growth engines by building finance systems and automating repetitive business tasks. With our specialty in accounting and financial advisory, we design financial systems and internal control systems such as payroll systems, optimize cash flow, redesign pricing, elevate your marketing strategy and implement automation so founders can scale with confidence, both financially and operationally. We combine strategic financial insight with intelligent automation to deliver lasting results.

Our mission is clear: increase revenue, improve cash flow, eliminate waste, and empower smarter, faster decision-making.

Service	Starter	Growth	Scale
Basic Accounting & Bookkeeping	✓	✓	✓
Basic setup of financial Systems	✓	✓	✓
Profit-Driven Strategy	✓	✓	✓
Cash Flow Acceleration Plan	✓	✓	✓
Financial Analysis	✓	✓	✓
Customer Analysis		✓	✓
Business Funding Strategy		✓	✓
Operational Efficiency Assessment		✓	✓
Marketing Positioning		✓	✓
Internal Control Systems			✓
Team Structuring			✓
Capital Strategy			✓
Internal Commercialization			✓
<b>AI - Package</b>			
Available as <b><i>add-on</i></b> or <b><i>standalone</i></b>	<b><i>Includes</i></b>		
	- AI Consultation		
	- AI Opportunity Mapping		
	- Integration with Existing Systems		
	- Process Automation Strategy		

## 1. Starter Package

Designed for early-stage businesses seeking financial clarity and improved cash flow management.

- **Basic Accounting and Bookkeeping services**  
Maintain accurate financial records and ensure compliance, giving you a clear picture of your business performance.
- **Basic setup of financial Systems**  
Implement customized financial systems that streamline operations, track results, and enable smarter business decisions.
- **Profit-Driven Strategy**  
Establishes pricing, cost structures, and business activities focused on profit maximization. Ensures financial decisions support long-term sustainability.
- **Cash Flow Acceleration Plan**  
Improves liquidity by identifying bottlenecks in receivables and expenses. Enables stronger control over short-term cash cycles.
- **Financial Analysis**  
Provides a high-level overview of business performance. Highlights revenue trends, expense drivers, and actionable areas for financial improvement.

## 2. Growth Package

Structured for companies preparing to expand operations, increase profitability, or secure funding.

→ Includes all services from the Starter Package (see 1).

- **Customer Analysis**  
Evaluates customer segments based on profitability and retention. Recommends focus areas to improve return on acquisition and service efforts.
- **Business Funding Strategy**  
Prepares the business for external investment or financing. Outlines capital requirements, funding options, and investor-readiness indicators.
- **Operational Efficiency Assessment**  
Identifies inefficiencies in workflows, systems, and processes. Proposes strategies to reduce waste, improve margins, and increase operational speed.
- **Marketing Positioning**  
Clarifies the company's market value and competitive advantage. Refines messaging, targeting, and brand positioning to drive higher engagement.

### 3. Scale Package

Intended for companies undergoing rapid growth and requiring long-term structural and strategic alignment.

→ Includes all services from the Growth Package (see 2).

- **Internal Control Systems**  
Implements financial checks, reporting policies, and approval processes. Enhances transparency, accountability, and risk protection as the business grows.
- **Team Structuring**  
Advises on leadership, reporting lines, and role definition. Supports efficient delegation and operational oversight.
- **Capital Strategy**  
Assesses optimal funding models, including equity, debt, and reinvestment. Aligns financial resources with business objectives and liquidity needs.
- **Internal Commercialization**  
Explores opportunities to turn internal systems, tools, or intellectual property into external revenue. Includes strategies such as white-labeling and licensing.

### → AI-Powered Package

Offered as a standalone solution or add-on to any core package. Suitable for companies looking to integrate automation and data intelligence into operations.

- **AI Consultation**  
Analyzes the business model and identifies opportunities for AI-supported growth, efficiency, or customer experience enhancement.
- **AI Opportunity Mapping**  
Outlines specific use cases where AI can increase productivity, reduce manual tasks, or enable better decision-making.
- **Integration with Existing Systems**  
Ensures compatibility between AI solutions and current infrastructure. Supports seamless adoption without disrupting workflows.
- **Process Automation Strategy**  
Designs AI-based automation for repetitive, low-value tasks. Aims to free up internal capacity and reduce overhead.

## → **Industry Focus**

At FinanceArix, we specialize in serving businesses across specific industries where financial clarity, operational efficiency, and intelligent automation create the most impact. Our primary focus includes:

### **Education**

Supporting schools, colleges, universities and training centres in streamlining financial processes and operational management.

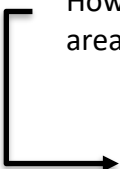
### **Transportation**

Helping logistics, freight, and passenger transport companies optimize cash flow, pricing, and internal controls.

### **E-commerce**

Assisting online retail and service platforms to enhance financial systems, scale operations, and implement automation.

While these industries form our core focus, we also work with clients from other sectors. However, engagements outside the industries listed above are less frequent, as we prioritize areas where our expertise drives the greatest results.



We are available for once-off projects and Contract work.  
Our doors are open for business to both individuals and companies.

## **[Tool Stack]**

- We use industry-standard tools like QuickBooks, Xero, Sage, Power BI, Google Sheets, Airtable, Zapier/Make, OpenAI APIs, etc., depending on your business needs.
- If you already have a preferred stack, your choice takes priority — we'll integrate with it and adapt our approach.
- If a specific tool isn't listed, don't worry: our team has broad experience across accounting, BI, and automation platforms and can work with whatever systems you use.
- We also develop custom-built systems tailored to your business needs and specific goals, either by combining and extending the tools above or creating entirely new ones from scratch. i.e., like automated payroll systems & Operational Workflow Automations

## Geographic Presence

- FinanceArix provides to SMEs globally. Our core clients are in Africa, and we also work with international businesses within our target industries.
- We are currently setting up virtual offices in South Africa, enabling seamless support.
- While most engagements are virtual, we can arrange in-person meetings if required.

## Communication

- We prioritize transparency and collaboration with every client. Clients receive detailed monthly or quarterly reports, strategy updates, and live progress tracking via our shared dashboard.
- Monthly calls are scheduled to review implemented strategies, make adjustments, and discuss relevant updates.
- If a client is consistently performing as expected, calls may be skipped to maximize efficiency. Communication is primarily handled through email, virtual meetings, phone messaging, Slack, and other business-approved channels.

## Core Values

At FinanceArix, our work is guided by core values that shape every decision, strategy, and client relationship. These values reflect our commitment to discipline, precision, professionalism, and long-term success.

Integrity First	Precision in Execution
Confidentiality	Strategic Adaptability
Excellence in Detail	Mutual Growth

### *Please Note;*

\* Following our consultation, the team at FinanceArix will select and propose the package best suited to your current objectives.

\* Standard Prices are available for the product list but these are not exclusive because we believe that every project differs in complexity and scope of work involved, therefore every client will be treated as a unique case