



Paychex Partner Pro: Power Up Your Client Advisory Services (CAS)

The accounting industry is under pressure to evolve and grow, all while managing limited resources.

Your clients are looking to you for strategic guidance, help navigating compliance demands, and support in making smarter financial decisions. They're relying on you to anticipate what's ahead to help drive stronger business outcomes.

Deliver the Data and Insights Your Clients Need

Paychex® Partner Pro gives you a single, streamlined dashboard to manage your shared clients' payroll and HR data. Save time, stay connected, and strengthen your CAS with real-time insights and built-in resources to guide strategic conversations.

- Pin top clients to track key changes and offer proactive advice.
- Leverage predictive analytics and available AI features, customizable dashboards, and benchmarking datasets to enhance CAS insights.
- Access a knowledge portal for industry content and time-saving tools.
- Explore a robust integrations marketplace for client API connections.
- Send referrals through the platform to give your clients access to tailored solutions while maintaining visibility into their account details.

Resource Corner



NEW Paychex Partner Pro Test Drive the Innovation

See the enhanced features of Paychex Partner Pro in action.
[Log in/Register](#)

Additional Resources:

THRIVE Podcast: Moving CPAs from Routine Tasks to Trusted Business Advisors

Using HR Metrics to Improve Your Bottom Line

Paychex Flex® Software Integrations Marketplace

2025 Tax Bill Decoded: Insights and Strategies for You and Your Clients

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Contact association@paychex.com to
access reporting for mutual clients.