PARTICLE41

ANDERSON
LEGAL, BUSINESS & TAX ADVISORS

CASE STUDY

# How Anderson Business Advisors turned its **client portal into a revenue stream** without adding headcount

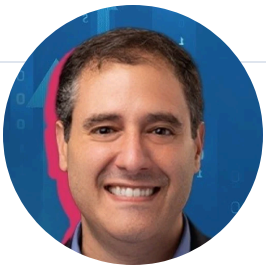
## A 12-Year-Old Portal and Hundreds of New Clients a Month

Anderson is “first and foremost an education first organization,” as Aaron put it. Most clients hold day jobs and are building real estate portfolios on the side. Anderson sets up the LLCs and holding companies that protect those properties, does their bookkeeping and tax returns with “a whole team of tax lawyers,” and builds living trusts for the next generation. Clients stay seven to eight years on average. Aaron’s view of the business shaped everything that followed: “The experience is the product.”

The PE investment went into sales and marketing, “and boy did that engine rev up.” Clients started “flowing in hundreds per month, quite literally,” and the systems behind them began to show their age.

The client portal “was built on WordPress about 12 years ago,” Aaron said. “Boy was it state-of-the-art 12 years ago.” When he talked with clients about how they wanted to work with Anderson, the portal “didn’t support that at all.” To buy anything, clients had to pick up the phone. Service response times were slipping.

The mandate from the PE firm was clear: keep growing clients and lifetime value, but “we don’t want to continue to add humans in order to service that growth.” That left two levers: automation and client self-service.



> We chose Particle because of their knowledge... of the space and what we do every single day.

**Aaron Videtto**
Head of Product & Client Experience
**Anderson Business Advisors**

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## Revenue First, With a Partner Who Knew the Legal Space

Aaron's team defined five client self-service components for a new portal. Fully implemented, the goal is to avoid hiring around 100 FTEs. "We're Anderson Advisors. We should be spending time advising our clients, not spending time pushing paper around."

Anderson showed three vendors the same requirements and wireframes. Cost and time to market mattered, but domain knowledge decided it. Anderson chose Particle41 because its team already understood registered agents, LLCs and why clients deed property into them.

The work came together around a few decisions:

- **Revenue first.** Of the five problems, the team tackled the one that pays for the rest: an online marketplace, so clients could order an LLC without a phone call.
- **A week of planning.** Everyone got in a room for a week of program increment (PI) planning and came out with a roadmap, timeline and budget.
- **One team, not a vendor.** "I highly respect a vendor that says, okay, we are your team... If you have a team with you that is willing to challenge your assumptions... that's the team that I want to work with."
- **Working through the hard part.** The real complexity was Anderson's Salesforce back end: how products are named, bundled and fulfilled. Once Particle41's engineers sat down with Anderson's Salesforce team, the architecture was redesigned around it. "We released on time even despite all of these changes to our architectural design."
- **Visible progress.** A new demo every three weeks for the whole company and the client advisory board has given the organization confidence that "when we say we're going to deliver something, we're going to deliver it [and] it's going to work."

What's next: Anderson is planning the portal's next major features with AI in mind, for example checking that a client uploaded the right tax document for the right year before anyone has to chase it.

> "This is probably one of the most advanced teams that I've worked with. ... Things go to market and they just work."

**Aaron Videtto**
Head of Product & Client Experience
**Anderson Business Advisors**

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## RESULTS

### ABOUT 5% ADDED TO TOP-LINE REVENUE

The online marketplace is “a completely new revenue stream that just simply didn’t exist before,” Aaron said. Clients now order in the middle of the night and on weekends.

### 4–5% OF EBITDA ADDED

That’s what the client self-service features released so far have added, as Aaron reported on the podcast.

### ABOUT 11% OF EBITDA EXPECTED BY 2028

Anderson expects that figure once the initial set of self-service features is complete.

### ABOUT 100 HIRES AVOIDED

Anderson is growing without adding the roughly 100–111 staff that growth would otherwise need to support it.

> “If I didn’t have to spend time talking about what a registered agent was with the engineering team, that would save a month for me.”

**Aaron Videtto**
Head of Product & Client Experience
**Anderson Business Advisors**