

Streamlining Client Workflows



Rea & Associates

Amy Smith, Client Education & Development Liaison

Regarded as one of the Top 100 accounting firms in the country, the Rea & Associates team consists of more than 300 dedicated professionals and industry experts. Committed to serving clients in the construction, government, healthcare, manufacturing, oil & gas and not-for-profit industries (with emphasis on family-owned businesses), the firm provides a range of innovative accounting, audit, tax and consulting services.

In her role, Amy Smith, a Certified QuickBooks ProAdvisor and Client Education and Development Liaison with the full-service Ohio-based accounting and business advisory firm, is responsible for creating and implementing training for QuickBooks users. By helping others understand the true value of this powerful tool, Amy is able to help users overcome technical challenges and identify solutions designed to maximize their back office processes.

Amy's insight and expertise is the result of overcoming the struggles she has had to endure while running her own business.

"Owners of small- to mid-sized businesses have to wear so many different hats," says Amy. "By optimizing the back office function of the business, owners can streamline their bookkeeping process and open up additional opportunities for revenue growth."

The Challenge

In an effort to augment the firm's tech stack to better manage their diverse client base and improve operations of their team, Rea & Associates sought out solutions that would allow clients to better manage their data entry efforts, streamline the internal and external workflow process and provide clients with up-to-date financial information. In short, Rea & Associates could better serve their small- to mid-sized business clients, if a greater effort was made to encourage better bookkeeping practices at the client level.

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The Solution

Already familiar with Right Networks, Amy attended the Scaling New Heights Conference to gain greater insight into various tech solutions. One session in particular, which was presented by a Right Networks executive, got her thinking about the potential of harnessing cloud-based bookkeeping solutions as a means to streamline workflows, handle application updates and file back-ups.

"Ultimately, our goal is to get the business owners we work with to take a more proactive stance to their bookkeeping responsibilities," said Amy. "The more timely information they put in, the better financial information they receive, which allows them to make better business decisions."

To learn more about how Right Networks can connect you to your clients, contact Sales at **1-888-210-0237**

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The Results

“The transformation for our clients has been remarkable,” said Amy. “We’re able to take their chaos and automate their processes so they’re no longer overwhelmed and can focus on the business of running their business.”

“Moving to Right Networks QuickBooks Desktop Cloud has allowed Rea & Associates to accelerate our growth while helping our clients do the same. It’s been a true win-win.”

Amy said she remembers one client in particular who was extremely reluctant to bring their books online due to their concern about the safety and security of their information. However, because they were so busy running their small business, they just didn’t believe they had enough time to keep their books up-to-date. After learning more about the solution, however, they agreed to give it a try.

“The client is now fully automated,” said Amy. “They are printing checks and their books are current. It’s a tremendous feeling to be able to take this burden off a small business owner’s shoulders.”

Another client, a snowbird who lives in Ohio but travels to warmer destinations during the winter, recently expressed their appreciation for the flexibility Right Networks has given them. Right Networks, has allowed them to collaborate easily – anytime, anywhere.

Additionally, Right Networks has accelerated the productivity and advisory efforts here at Rea & Associates.

The firm’s team of bookkeepers are now able to offer live support from anywhere, can instantly log-in to a client’s account to offer insight and advice and can orchestrate immediate fixes and application updates as well as file back-ups.

“There is tremendous comfort in knowing that our client’s data is safe and secure,” said Amy. “And it’s really great that our bookkeepers now have the bandwidth to meet expanding client demands. It’s really a win-win.”



And while it’s so important to have the right tools to do the job, Amy said that understanding how the tools work and why they’re necessary is just as important – regardless of if you’re growing an accounting practice or a small business.

“Growing a successful accounting practice, like growing a successful small- to mid-sized business, can be challenging,” said Amy. “Moving to Right Networks QuickBooks Desktop Cloud has allowed Rea & Associates to accelerate our growth while helping our clients do the same. It’s been a true win-win.”

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