AMPING UP
operational efficiencies and firm growth with advanced cloud technology.

Wegner CPAs

BRITIANY CROSS
Supervisor of On-Boarding Project Management

Progressive CPA firm maximizes the power of Bill.com to streamline broad workflow and approval processes, maintain airtight compliance, and enhance the client experience

Britiany (Brit) Cross, Supervisor of On-Boarding Project Management at Wegner CPAs (Wegner), helps lead efforts in the firm's accounting department. A key area of this business is outsourced accounting services, which includes the management of clients' account payables and receivables using Bill.com. Clients can hand over the paying of bills and customer invoicing to the firm and work with Wegner staff conveniently in the cloud.

Cross came to Wegner with in-depth knowledge of Bill.com, having used the solution at her previous employer's firm. She knew exactly what the system could do to significantly enhance operational efficiencies.

"The last firm I worked for used Bill.com, so I had a lot of experience with its features and capabilities coming in. I began training and strategic sessions right away with staff and managers."

Cross also uncovered that Bill.com was paired with non-cloud solutions, which further impeded the firm's ability to streamline and automate A/R and A/P processes. It also barred staff from working within a far more efficient digital environment–keeping them tethered to paper and time-intensive manual processes.

"Bill.com was lumped in with desktop-based accounting applications. This meant that we couldn't enhance internal processes or offer a full online solution to clients," Cross explained. "Once we paired Bill.com with Intacct, we were able to support a true cloud accounting solution."

Overall, moving to a cloud-based platform has served the firm well in terms of increased efficiencies. In fact, Cross defined three key areas of value with Bill.com: advancing the approval process, elevating compliance, and dedicated support from CPA.com.

Powering efficiency and compliance

Implementing an advanced approval process has proven exceptionally valuable according to Cross. "The approval process can be quite complex. With Bill.com, we can put all approver permissions in place up front. This supports a highly systematic and streamlined process because everything is online and structured. For some clients, the new process has eliminated the need to route paper permission forms among multiple approvers."

With Bill.com, Wegner staff can handle all up-front A/R and A/P tasks for clients. "We are doing everything up to the point where the client only has to click a button to approve or send back corrections," Cross said.

Compliance is also a big deal. Maintaining accurate financial records is critical in today's mandate-driven business landscape. Using a robust online platform like Bill.com allows Wegner to maintain an accurate and timely digital audit trail, manage a structured approval

process, and segregate duties accordingly. All of this adds up to airtight compliance.

Cross explained, "We are moving a lot of money around for our clients, so we have to use a product that allows us to track all transactions and assign proper approvers…all in the name of compliance. Within Bill.com, we can look at a complete audit trail at any time. We can also easily control approvers and segregate duties among the right people."

Efficiency further improves when users understand the technology and can maximize functionality. Cross was praiseworthy about the support she receives from CPA.com.

"I don't know what I would do if I didn't have a direct contact at CPA.com to work with," Cross stated. "We are currently working on the new 2.0 sync between Bill.com and Intacct. When you work with multiple systems, it's nice to have a single contact to answer your questions. My CPA.com contact bridges the gap in trying to figure out both applications. I think I would go crazy if I didn't have this support."

The power of smart technology

Bill.com is at the center of Wegner CPA's well-run accounting department. The efficiency gains realized have been immense–not only helping the firm improve internal workflow processes, but also enabling staff to better serve clients.

"Moving to a cloud-based system has eliminated a lot of the manual processes for our clients. With online approval capabilities, we've made their lives so much easier," said Cross.

Cross provided a distinct example of how one Wegner client has benefited greatly from working within a cloud platform. "One of the larger clients that we implemented last year absolutely loves Bill.com. The client [a large non-profit] has thirteen supervisors and each one is in charge of a different program. So when bills come

in, they not only have to be approved by the appropriate program supervisor, but also by the CFO and the Executive Director. Before Bill.com, they were filling out paper approval sheets and manually passing them around to all the required people. It was just a mess. We've eliminated all this manual, time-draining work for the client."

Return on investment also hasn't gone unnoticed. "It's [Bill.com] clearly fueled operational efficiencies. Last year, we took on five new clients without increasing staff."

Cross has been integral in advancing processes within Wegner CPAs. Understanding the power of Bill.com, she has helped staff use the system to its full capacity, and as a result, better serve clients.

"We love Bill.com, and so do our clients," Cross Stated. "I appreciate all of the support I get from CPA.com. Dealing with technology is always easier when you have a partner."

Contact us today!
855.855.5CPA

Learn more at:
CPA.com/Bill

Wegner CPAs
→ *Guiding you.* Beyond the numbers.™

STATS AT A GLANCE

Firm Profile
Full-service CPA firm specializing in individuals, businesses, and non-profits

Locations
Madison, Baraboo, Janesville, and Pewaukee, WI; New York, NY; Washington D.C.

Staff
>100

"It's [Bill.com] clearly fueled operational efficiencies. Last year, we took on five new clients without increasing staff."

– **Brit Cross**, Supervisor
Wegner CPAs