



CPA revs up business for high growth clients and his own firm

AT A GLANCE

- A San Francisco Bay area CPA left a big accounting firm to realize his vision of providing value-added accounting for small business owners. Making QuickBooks® the cornerstone of his practice helped it grow rapidly.
- With QuickBooks Enterprise Solutions, clients take more interest in their accounting and are prepared to spend more on strategic business advice. They also appreciate the added power, security and reporting of the enterprise-level product.
- The ProAdvisor® Program provided this CPA additional credibility when he started his firm and today delivers quality leads that further his depth of experience.

ACCOUNTANT PROFILE

Bryce Forney

- Founder: Forney Accountancy Corporation, Pleasant Hill, CA
- Consults with over 50 companies in the San Francisco area.
- Certified Amicus® and Timeslips® consultant, in addition to QuickBooks ProAdvisor.
- Goal is to translate the necessary task of accounting into a natural and meaningful process for the small business owner.
- “Once clients switch to QuickBooks Enterprise Solutions, their accounting becomes more significant to them. So it’s an opportunity for me to be of more value to clients, and for clients to get more strategic information,” he says.



“My clients have gone from an accounting foundation that’s reliable for tax returns to a true information system that can provide the decision basis points for profitability, cost analysis and growth.”

“That’s the power of Enterprise Solutions.”

Bryce Forney
Forney Accountancy Corporation

Seven years ago, young CPA Bryce Forney found he was doing everything for a big accounting firm: answering the phone, engaging clients, and going out and doing projects. But the big checks were going to someone else.

So in 2000, Bryce decided to start the engine on his own business in Pleasant Hill, CA, 30 minutes east of San Francisco Bay. From the beginning, he wanted to provide meaningful year-round advice to clients, as opposed to doing tax returns once a year.

“I feel that many CPA firms are selling the concept of tax planning,” he says. “But the tax return is just a form based on the accounting, not the other way around. So I was able to connect with small business people and say, if I get your books right, your tax returns will be a much more reasonable task to tackle.”

Recommending QuickBooks® software is a big part of this mission.

“CPAs my age or younger have to focus on QuickBooks, or we’ll lose our value in the marketplace,” says Bryce. “It has become the de-facto standard for business accounting.”

Bryce says the family of programs fits his vision of providing better information for better business management.

“I can talk to clients about how their bank accounts are reconciled, or how their expenses have been accounted for in the right bucket, but it’s nothing to them. But if I say, ‘Your profit margin seems a little bit low for your industry,’ that resonates.”

Add muscle with no headaches

Now Bryce has an even more powerful version of QuickBooks for certain clients. With QuickBooks Enterprise Solutions, he’s driving his business to the next level.

“Once clients switch from QuickBooks Pro to QuickBooks Enterprise Solutions, their accounting becomes more significant to them. So it’s an opportunity for me to be of more value to clients and for clients to get more strategic information,” he says.

In addition to strategic reasons for changing, clients typically benefit from the higher performance available in Enterprise Solutions. In fact, several firms converted because they were doing so many transactions every day, their data files had become too big for QuickBooks Pro.

He appreciates how the Enterprise version supports higher transaction volume, faster performance, expanded reporting, inventory control, and a job-costing function that helps clients see the exact price of doing business.

Yet it still offers an interface that looks just like the other QuickBooks products—a critical factor that helps clients feel confident enough to upgrade.

Car repair business steps on the gas

The day Intuit launched Enterprise Solutions in 2002, Bryce bought it for Bascom Trim and Upholstery, a busy car repair shop with 30 employees in Santa Clara, CA.

The company's data file had outgrown QuickBooks Pro, so that only six months' worth of transactions could be online at a time. This slowed down dealing with repeat customers, who had to be re-entered into the system from scratch. The new system accelerated many parts of an operation already well-known for its efficiency.

General Manager John Wardell says the company was particularly interested in linking its repair orders directly with the accounting system. Before Enterprise, these orders were all recorded in FileMaker Pro, then transferred manually every day into QuickBooks Pro.

Now everything is handled with Enterprise Solutions, which saves hours in reconciling, and helps the company clear up any payment issues faster and more professionally.

Bascom also has a more streamlined inventory process. Before, it used to count up items and then match them to the year-end sales figures, a process Bryce says was "painful and inaccurate." Now whenever any item is purchased, that transaction goes automatically into the system, so that inventory records are always accurate and up-to-the-minute.

And John can now track inventory from the four companies under the same roof—for upholstery, stereos, glass, and detailing—and consolidate them all on the same report, or break out each one separately.

"It's fabulous to get 10 different reports, because I can see 10 different sides of the business," says John. "We're really pleased with all the reports we can pull off this system."

John can also do a time-cost analysis for each of his employees. This has led the company to start tying part of an employee's pay check to their productivity.

Twelve of Bascom's employees access the system, but security is not an issue. Thanks to the various profiles set up in Enterprise Solutions, Wardell and the company owners can see everything, while regular employees can't access any payroll, personnel, or bank account information.

"Everything is all right there in front of you. You can put it all together with QuickBooks payroll, inventory, and time-tracking," says John. "You don't need more employees to run the system, and you don't need to outsource your bookkeeping because you can do it right here."

QuickBooks ProAdvisor® Program provides marketing boost

Bryce certified in the QuickBooks ProAdvisor Program the first year it began, and then added the Advanced QuickBooks ProAdvisor Certification this year.

"When I started, it was just me and a desk and a phone, so to be affiliated with

QuickBooks gave me more credibility. I can't imagine doing what I do without QuickBooks. It's the cornerstone of my practice," he says.

Bryce says the volume of leads he gets from the program is phenomenal.

Getting his clients to clean up their systems by getting them onto QuickBooks benefits him as well, because he can be more productive on his end when he has a cleaner file to work from.

"There's no way I could do as many tax returns as I do unless I had good, solid accounting coming into my office," he says, "If I have a question, I can just double-click on the item for an answer. There is no back and forth with the client. I can't really imagine being a CPA practice without being affiliated with QuickBooks."

Helping you build your business

For more than 10 years, QuickBooks has worked with small businesses to develop tools that will help them succeed. Today QuickBooks is doing the same for larger, growing businesses with products like QuickBooks Enterprise Solutions—the most powerful QuickBooks product ever. With a four-star "CRN Test Center Recommended" rating (November 2006), QuickBooks Enterprise Solutions has the capabilities and flexibility to meet the unique needs of growing businesses, potentially helping them save thousands in up-front and ongoing costs.



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**John Wardell, General Manager
 Bascom Trim and Upholstery**

FOR MORE INFORMATION

For more information about QuickBooks Enterprise Solutions, other QuickBooks products, or the ProAdvisor Program, visit our Web site at www.accountant.intuit.com.

For more information on Forney Accountancy Corporation please visit www.forneycpa.com.

See it in Action

To see more information about QuickBooks Enterprise Solutions, or to try out an interactive trial, please visit <http://quickbooksenterprise.intuit.com/forms/testdrive.jhtml>.

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