

CASE STUDY

How CLA Helps Business Clients Scale with QuickBooks Online

CliftonLarsonAllen (CLA) helps fast-growing business clients unlock the power and functionality of QuickBooks Online to drive success as they expand and scale their business.



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— Jennifer Witts,
CLA's Managing Principal
Client Accounting and Advisory
Services (CAAS)

QuickBooks Online: The right fit for CLA and its clients as they grow their business

Small- to mid-sized businesses are passionate about their work. However, many need assistance with accounting and finance functions, as well as help navigating the tools and technologies needed to effectively run and scale their business. For firms like CLA, this is an ideal opportunity to provide the value-add services that clients need and want to grow their business.

"As clients scale, their operations do reach a level of complexity where they do need a team who truly know what they are doing to help from a planning and reporting perspective and who can advise and challenge some of the decisions they're making. As these small- to mid-sized businesses grow in complexity and size, they outgrow that do-it-yourself mentality," Jennifer Witts, who serves as CLA's Managing Principal for Client Accounting and Advisory Services (CAAS), said.

CLA is committed to enhancing service delivery through technology, guiding client to the tools they can use to help efficiently manage and scale their operations. However, one issue that firms like CLA can face is a concern among clients that they may potentially outgrow systems like QuickBooks Online.

Highlighting the robust capabilities QuickBooks Online and the firm's strategic use of the platform, Witts said, "Clients often worry Quick Books Online won't keep pace as their business grows and consider adopting an expensive ERP system early, to avoid future disruption. I consider it a success when, after understanding the client's needs, we see how QuickBooks Online can grow with their business, providing reassurance they don't need to implement a costly ERP today to stay ahead."

This emphasizes the adaptability and comprehensive features of QuickBooks Online, which CLA leverages to effectively meet the evolving needs of its clients, thereby mitigating the fear of outgrowing the system as clients expand their business.

Furthermore, the third-party integration capabilities available through QuickBooks Online deliver the customization and flexibility that CLA and its clients need to meet their unique business needs. To elaborate, Witts outlined some examples:

- If a business client's POS does not directly connect with QuickBooks, CLA can work with the client to determine if there is a third-party integration in place to enable the automatic import of data.
- If the client is struggling with limitations on inventory, for example, CLA can help them find and leverage a third-party app to address their needs. This means the client can avoid upgrading to a costly ERP system in the near term.

MEET THE FIRM

CliftonLarsonAllen (CLA) is a top 10 accounting firm focused on serving small- to mid-sized clients. CLA is an independent network member of CLA Global. See [CLAGlobal.com/disclaimer](https://claglobal.com/disclaimer)

LOCATIONS

More than 130 locations in the US

INDUSTRIES SERVED

Agribusiness, food, and beverage
Construction
Education
Financial services
Government
Healthcare and life sciences
Logistics
Manufacturing
Nonprofits
Private Equity
Professional services
Real estate
Retail, dealerships, and hospitality
Technology

NUMBER OF STAFF

Nearly 9,000 professionals

PRODUCTS USED

QuickBooks Online
QuickBooks Online Advanced
QuickBooks Payroll
QuickBooks Payments

- CLA can help clients, especially those within professional services or construction, unlock the capabilities of Projects in QuickBooks Online to better manage and track project profitability. Oftentimes, business leaders aren't aware that the Projects feature within QuickBooks Online exists or they are unsure how to maximize its potential.

Witts also noted that having convenient access to all key client financial data — such as bank feeds, bills, payroll journal entries, etc. — in one place without having to do manual uploads and imports saves significant time and drive efficiencies. Furthermore, KPI insights can help CLA track a client's business performance.

Clients growing with QuickBooks is a road to standardization

In the past, CLA was system agnostic and would adjust to the accounting system it's clients had selected, thinking this flexibility was important to clients. However, over time it became clear that many clients could benefit from standardizing to a single system, allowing them to have more effective processes, gain efficiency and prioritize their spend in other areas.

Reflecting on the firm's system-agnostic approach Witts said, "We realized, taking into account the range of our clients and their needs, we could implement the service enhancements our clients deserve by focusing resources on a small number of ERPs that are well-suited for our clients, including QuickBooks."

For CLA and its clients, a strategic shift toward standardizing industry technology stacks was the answer. CLA performed an inventory of the most widely used software by their clients by industry and coupled this with their own industry knowledge to determine the industry software solutions frequently used and preferred by their clients.

Within almost every industry, CLA found QuickBooks Online was most frequently used and preferred by clients. QuickBooks Online is a cloud-based financial management software that brings clients' business financials, insights, and data, all into one place.

The shift to QuickBooks Online had an added benefit: it helped some client who had been using systems that lacked the necessary functionality to adeptly run their business and improved their operations.

"Over time, what we realized, almost universally, is that QuickBooks Online is a solid solution for most of our clients as it has become so much more sophisticated and flexible and continues to add needed features," said Witts. "As our relationship has grown with Intuit, we feel confident in the product roadmap which has encouraged us to invest more in delivering consistent Quickbooks training to our staff and showed us that Quickbooks Online is a good solution for many of our clients."

Witts says CLA has noticed that the lifespan of QuickBooks Online for their clients continues to lengthen due to the volume of advanced features QuickBooks Online continues to release.

If a client is not using QuickBooks and they agree QBO features are a better match for their needs, CLA works to convert the back-office operations to the software solution and advise on the appropriate tech stack needed to run their business.

That said, when QBO is not the best fit for clients, CLA's digital professionals deliver larger ERP implementations, using deep industry experience to select prevalent, leading industry platforms, taking into account a client's full breadth of business needs, including data automation, analytics and integrations.

The firm's strategic shift towards standardizing its industry tech stack has not only proven beneficial for clients but also for the staff at CLA.

QuickBooks Online: Seeing the results

Through its relationship with Intuit, CLA has been able to save fast-growing clients time. This allows them to focus on running their business instead of handling accounting and ease the strain on staff.

"Choosing the right ERP system can help clients to allocate their early funds more effectively by avoiding unnecessary software expenses. They can prioritize business growth. Investors appreciate this kind of responsible decision-making, as it demonstrates focus and financial discipline," Witts said. Witts often advises clients to direct their early-stage cash to sales, marketing, and product design and encourages clients to trust that QuickBooks Online will meet their accounting needs for the foreseeable future.

"When we can train our professionals on select industry systems that they like to use and they feel good about the work that they do, which leads to better retention. This makes our clients happy and we continue to serve them well because they don't have turnover in their teams," said Witts. "We've really started to see the benefits of all of that coming together."

About QuickBooks

For more information on how the QuickBooks product suite can scale with growing clients, [contact the QuickBooks](#) team to see how we can help.