

## Clients Coming Back to CPA for More with QuickBooks® Enterprise Solutions

### BUSINESS CHALLENGE

CPA Stewart Mueller needed a line of financial management software that could grow along with his clients, and support a wide variety of industries, without the costs of learning and supporting numerous systems.

### SOLUTION

QuickBooks Enterprise Solutions:

- Flexible system that suits almost any industry
- Multiple user capabilities for growing companies
- Powerful security settings for multiple users
- Complete set of payroll services (available with subscription)

### BENEFITS

- Cost-effective system saves clients thousands of dollars compared to other packages
- Clients growing out of other QuickBooks versions can stay with familiar product family
- Legendary ease-of-use with minimal learning curve

### CUSTOMER PROFILE

- CPA since 1996, ProAdvisor since 1999
- Located in St. Louis, Missouri
- 15 clients on Enterprise Solutions, 45 clients on other versions of QuickBooks
- Clients range from \$100,000 to \$7 million in sales
- Practice growing on average 25% per year

### CLIENT PROFILE

- Hotel management firm located in Farmington, Missouri
- Operating seven hotels under three different companies
- \$6 million in sales in 2005
- 380 employees last year, with a considerable turnover rate



*“As my clients grow, they need a solution that can grow with them. With Enterprise Solutions, I’ve been able to retain my clients, because they don’t have to look elsewhere for software. Therefore, I don’t have to give up clients to bigger firms. And I’ve gotten a lot of clients from other CPAs who haven’t been on the ball about software.”*

**Stewart Mueller, CPA**  
Pictured with Mike VanStavern and Mark Randolph, Hotel owners

When you’re a CPA who helps small businesses dream big, you need to be there when the dreams come true.

CPA Stewart Mueller has been there for his clients ever since 1998, when he opened his doors in St. Louis, Missouri. Stewart offers financial, tax, and consulting services to small and mid-sized firms in numerous industries. With the help of QuickBooks, his business is growing at an eye-popping rate of 25% a year. He’s even added one full time and two part-time employees to keep up.

“My goals are to enhance my client’s experience by going above and beyond,” he says. “This means they get up-front advice, personal attention, and a commitment to their long-term goals.”

Since 1998, Stewart figures he’s trained more than 100 clients on QuickBooks. He’s been a certified QuickBooks ProAdvisor since the program was created in 1999. Today he has about 50 clients, all of them running QuickBooks. And with his help, 15 of his clients have already upgraded to Enterprise Solutions.

#### Enterprise Solutions Helps CPA Retain Clients

Every entrepreneur wants strong growth for their company—but they don’t always plan for the growing pains. This applies to accounting firms too: as a client grows, it can easily outgrow the firm’s ability to support them properly.

“Most of my clients started small. And as they’ve grown from \$1 to \$7 million, I’ve been able to keep them as clients,” says Stewart. “With Enterprise, I can retain clients as they grow, or form multiple companies, or merge. Enterprise Solutions is a great alternative to other high-priced solutions,

and for an accountant, it’s a good tool to retain business.”

Stewart appreciates having just one product family that can cover all his clients, no matter what their size or specialty. “I don’t have to learn all different software to handle different industries,” he says. “Enterprise Solutions provides a natural progression that can handle it all, all in one package.” For clients looking for even more industry-specific tools, it comes in Contractor, Manufacturing and Wholesale, Nonprofit, Professional Services and Retail editions.

#### More a Consultant Than a Bean Counter

As Stewart’s accounting practice grows, he prefers to add value for his clients as a trusted advisor, not a bean counter. After helping a client automate their routine processes, he can then take on a more valuable role as a business consultant.

“Instead of paying an outside accountant just for bookkeeping, adding up numbers, or entering checks, they’re employing me for advisory services. I can act as a sounding board, showing them how to run the business better and make more money,” he says.

Stewart can certainly advise clients when it’s time to move up to Enterprise Solutions. He looks for companies that need more than five users, as well as flexible security provisions for their multiple users. Some of his clients who upgraded were looking for consolidated reporting, so the system would total up figures from several different companies or businesses on the same reports.

Stewart and his clients like the fact that Enterprise Solutions is so cost-effective, with

substantially lower license fees than other mid-market applications. And they appreciate how it offers a straightforward upgrade with a minimal learning curve from any other version of QuickBooks. All that makes it an easy sell for Stewart.

**Hotel Firm Benefits From CPA's Software Expertise**

How can Enterprise Solutions help a growing client? Just ask Premier Management Inc. Based in Farmington, Missouri, this management firm runs seven hotels with revenues of \$6 million last year.

When owners Mike and Kim VanStavern decided to upgrade their systems at the start of 2005, they got QuickBooks and asked Stewart to help them print checks with it. But he saw a lot more possibilities. "There was a great opportunity to help them improve," he says. "I saw that they could automate and centralize everything."

With their old system, the hotel managers used to fax in paper receipts every night to an accountant who keyed this information into a basic ledger program. Reports were always two to three months after the fact, and the managers got little guidance on whether their expenses were what they should be.

So Stewart helped set up a system with Enterprise Solutions running on a central server. Then he designed a training program for each hotel manager to learn how to log in and input their daily revenues, timesheets, and expenses directly into the software.

"Instead of the owners spending time checking to make sure everything is right, they made that part of each manager's responsibilities," says Stewart. And thanks to the flexible security settings, each manager sees only the information they need from their own hotel, not the overall company.

**New Insights and Future Growth**

The hotel owners wanted to offer their managers a bonus for hitting certain gross profit margins, encouraging them to watch their revenues and expenses carefully. But their old system couldn't produce results fast enough. Not having timely financials made it difficult to hold the managers accountable for achieving better results.

"Before we had Enterprise Solutions, we had no idea where we stood mid-month," agrees Nancy Lowe, the controller with Premier Management. "It was hard to show the managers where they stood. Now everything is ready at all times. I can send them reports, so they can adjust their spending to come in at the right level to earn their bonuses."

With Enterprise Solutions, Premier Management can run consolidated reports that roll up every hotel's results into one P/L statement. This flexibility to track both the performance of individual locations and the overall business gives the owners new insights into their operation's profitability.

Payroll has been another big win for the firm.

At the end of 2005, Enterprise Solutions

generated 380 W2 forms, one for everyone who'd worked in any of the hotels at any time during the year. "Using the payroll service that integrates with Enterprise Solutions, everything is right there and easy to do," says Nancy, who has already recommended the software to another firm. "Now we're hoping to grow, and add more hotels!"

Stewart estimates that the hotel management firm is saving \$15,000 a year in accounting fees after their upgrade, and getting better, faster results to boot. Premier Management is just one of Stewart's clients getting lots of benefits from upgrading to Enterprise Solutions. Now when a client has a big dream, he can help turn it into reality.

**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 2005), 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.

**QuickBooks Enterprise enabled Stewart Mueller to:**

- Retain clients as they grow in size and complexity
- Avoid having to learn and support multiple accounting systems
- Automate routine tasks for clients
- Focus on providing value-added consulting, rather than number-crunching

*"QuickBooks is one of the foundations of my practice. It's a flexible family of software: I can apply it to multiple industries and to businesses of all sizes. It is a known brand in the marketplace, and that opens doors for an accountant."*

Stewart Mueller, CPA

**FOR MORE INFORMATION**

For more information about QuickBooks Enterprise Solutions for accountants, visit our Web site at <http://accountant.intuit.com/es> or [www.quickbooksenterprise.com](http://www.quickbooksenterprise.com), or call 888-236-9501.

For more information about SLMCPA, visit [www.slmcpa.com](http://www.slmcpa.com).

**Free Demo**

Click "Test Drive Now" on <http://accountant.intuit.com/testdrive> for a free demo of QuickBooks Enterprise Solutions.

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