

# Customer success story

**A modern payroll  
platform for a modern firm**

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*Dunning & Associates CPAs*



# The back story

On first glance Dunning & Associates CPAs may look like a traditional accounting firm, but as you'll learn, they are anything but.

Located in Wichita, Kansas, the firm offers an impressive roster of accounting services, including payroll, tax preparation and planning, bookkeeping, and R&D credits. But what truly sets them apart is their vision and mission statement:

*We are passionate about empowering clients to achieve success through simplified processes, innovative technology resources and sound advising.*

The Dunning & Associates team took the first step towards becoming a modern firm when they joined Rootworks in 2012. This step allowed them to begin fulfilling their vision to simplify processes, utilize innovative technology resources and serve as advisors to their clients. The firm worked closely with the Rootworks team as they built their modern firm. And like any journey, there were obstacles along the way, such as time-consuming tie-out processes, cumbersome software and of course, COVID.

## Overcoming a major obstacle with the help of ADP®

The biggest obstacle the firm needed to address was the elevated number of tax notices.

"Prior to moving to ADP, the client payment process was not systematic. This contributed to the rise in tax notices," Lisa Binau, CPA and Client Manager, explained. "When we moved to ADP, we were able to fix this issue for clients."

As a result, the team was constantly in a time crunch to resolve late or missed payments. According to partner Jim Wurbs, they were in desperate need of a new system to keep everyone accountable—particularly clients.

## Enter RUN Payroll for Partners...

To align with their vision, Dunning & Associates partnered with ADP to implement RUN Powered by

ADP® Payroll for Partners (RUN for Partners). RUN for Partners is a cloud-based platform for accounting firms to offer to their small business clients to handle their payroll, tax, compliance and HR in one streamlined solution.

Prior to making the switch to RUN for Partners, the firm operated within a fairly "disconnected" technology ecosystem. There was one system for payroll

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and another for direct deposits—and they were not integrated. Overall, the system was cumbersome and made for a daunting tie-out process every quarter. Using disparate systems also made for a clumsy and cumbersome training process with staff.

Today, with ADP the firm has streamlined the payroll process as well as training on the product for staff and clients. The team also enjoys many additional benefits, such as automated payroll tax payments and the tax filings. This takes the frustration and uncertainty out of filing payments.

"Structured payments offer our team peace of mind," said Jim. "Just knowing they've been paid on time eliminates worry across our team. One click and it's done."

RUN for Partners supports the firm with powerful automation. And more automation means fewer notices and fewer fines and penalties. This also helps the Dunning team look like rock stars to their clients.

## The power of the cloud paves the way for a modern payroll process

RUN for Partners empowers small businesses by making payroll quick and easy. Users can preview and approve payroll while managing the process from anywhere—computer or tablet. This offers firms like Dunning & Associates complete control at all times.

"The biggest value to me is that the system is cloud-based," Lisa stated with a sense of relief. "It's that extra level of convenience of knowing it's always available when you need it."

Using RUN for Partners, the firm was able to effortlessly make the move to remote workspaces during the pandemic. Staff members were sent home with laptops and the ability to access the payroll system with ease. Even as more companies are returning to the office, Jim and Lisa have the peace of mind that payroll can still be processed from a virtual workspace.

"Cloud-based is where we're going," Lisa said. "Not worrying about whether payroll can get processed because the Internet has gone down at the office has

been such a relief to us. We can grab our laptops and head home to finish payroll without missing a beat."

## And the list of benefits goes on...

Being cloud-based is just the tip of the value iceberg. With RUN for Partners, Dunning & Associates has realized many other major benefits—from uninterrupted processing and faster solution adoption to the ability to support higher-value advisory services.

### ■ Seamless updates provide uninterrupted processing

Jim and Lisa love that system updates happen behind the scenes. They don't have to worry about installs onsite anymore and the disruption this causes. "The update process runs so smoothly," Jim said.

**It's always functional! There are no regressions or rollbacks to deal with, which allows us to continue business as usual with zero hiccups.**

"Before ADP, we would have to coordinate with our team, our third-party IT group and our previous provider in order to get new updates installed. It was extremely inconvenient, especially when updates were frequently needed."

He added: "It's always functional! There are no regressions or rollbacks to deal with, which allows us to continue business as usual with zero hiccups."

### ■ Ease of learning leads to faster adoption

The firm currently handles payroll for roughly 85 clients. The intuitive nature of the system makes it far easier for clients to get up to speed, which relieves the firm of extensive training and follow-ups.

Dunning discovered this first-hand, as Lisa explained: "We recently lost our payroll processor, and because RUN for Partners is so easy to use and user-friendly, a client manager stepped right in and processed payroll seamlessly."

With their previous provider, there was an extreme learning curve. But now with RUN for Partners, this is no longer an issue. The firm can also onboard clients electronically much more quickly and process payroll faster than ever.

#### ■ **A champion in their corner accelerates success**

Jim and Lisa also attribute their success with ADP to having a dedicated ADP champion. Having someone who is in their corner made system adoption a rich experience.

Lisa said: "Our dedicated champion is a resource we can turn to for the support we need when we need it."

It also opened their eyes to other helpful ADP solutions such as TotalSource®—ADP's PEO Model—which provides firms with more HR support while

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encompassing a robust benefit offering to their employees. It also integrates with payroll freeing up administrative time and creating more efficiencies.

In addition to RUN for Partners and TotalSource, Dunning & Associates partnered with ADP to extend a \$371,000 Research and Development tax credit to an engineering client. "The R&D team was professional and easy to work with, which made our firm look top notch to our client," Jim said. "We didn't realize ADP had this hidden gem of a service to really elevate the types of services we can provide our clients."

#### ■ **Better data supports advisory services**

Leaders within Dunning & Associates know that at the core of a modern firm is advisory services.

According to Jim, "Advisory services are the future to long-term success. And client data is key in order to offer our clients the most informed advice."

The Dunning team is excited to tap more into the power of Accountant Connect—a cloud-based portal that provides access to exclusive resources that give firms the power to strengthen their advisory services with critical insights. It allows firms to automate the compliance piece of the business while expanding future offerings.

The future becomes less about focusing on compliance ("the necessary evil") and more about advising their clients on software, making decisions on payroll and tax decisions.

Lisa is incredibly excited about the breadth and depth of data offered within Accountant Connect. "We can dig into client insights, industry reports, business valuations and compensation benchmarking. This gives us everything we need to provide expert advice."

"We are most excited about using client insights and compensation benchmarking," said Jim. "There's so much good information available to us, like average pay rate in our area, that we can tap into. And we have access to client insights, which allows us to proactively work with clients about additional services they may need."

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## Final words...

When it comes down to it, it's all about saving time. Time savings equate to better realization rates, more time to offer higher-value advisory services, a richer experience for staff and clients...and the list goes on.

"A lot of accountants are guilty of just looking at the cost of technology and not considering how much time it will save us," Jim explained. "This is a mistake. We have to invest in better, faster and more innovative technologies to run better firms."

ADP solutions help firms increase efficiency, streamline processes and access data at a whole new level to better serve clients and operate at peak efficiency.

Jim summed it up well: "RUN for Partners is the modern platform for our modern firm."

### **Build your modern firm using a modern platform!**

Learn more about what ADP can do for your firm by contacting **Stacy Bolser** at [stacy.bolser@adp.com](mailto:stacy.bolser@adp.com)

For more information on Rootworks and our resources for The Modern Firm®, please contact sales at [membership@rootworks.com](mailto:membership@rootworks.com)

