



Growing beyond traditional accounting services with HR technology

Presented by **accountingWEB**  
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# Challenges Met Layering in HR Advisory

For the myriad of firms that offer payroll to their clients, the next logical move towards offering a true value-add is through HR advisory services. This may seem simple in theory, but how do firms get there and why is this the next natural step?

A recent ADP® study shows that 62 percent of business clients want HR & talent management insights from their accountant.\*

Firms also need compensation benchmark data to advise on hiring and retention and better overall insight into what services clients have versus what's missing.

Client Accounting Services (CAS) provider Complete Controller went through this journey and shared their challenges and results in the case study below, as recounted by Founder & CEO Jennifer Brazer.

## Background

Complete Controller is a virtual bookkeeping and records storage service serving small businesses all across the United States. Their work is performed 100 percent in the cloud, which Brazer says allows them to provide real-time access to it for customers and the CPA firms that use Complete Controller as their CAS solution.

Efficiency through standardization is the key to the firm's profitable performance, according to Brazer. In order to achieve standardization, the tech stack that its customers use for their back office management, which is built around QuickBooks® GL software may include, Payroll, Payment Processing, Practice Management Software, Ecommerce, Point of Sale, ERP and hosted by the firm.

## Quick Facts



Jennifer Brazer  
Founder and CEO

Name	Complete Controller
Industry	Accounting
Established	2007
Employees	30
Headquarters	Austin, TX
Website	<a href="http://completecontroller.com">completecontroller.com</a>



“ Each pay period we’re saving on average 15-30 minutes per client, per month thanks to Accountant Connect.”

-Jennifer Brazer,  
Founder and CEO



## The Problem/Challenge

The firm found that not all tech stack components are built for seamless integration, which would be exceedingly efficient. Instead, they found themselves working with bridges, connectors, macros, anything that will allow them to push the data to the GL. This was particularly at issue with payroll work.

## The Process

At the beginning of each customer relationship the firm was forced to work with any existing back office solutions a customer already had in their tech stack. Early on, though, Complete Controller begins the process of advising customers about the streamlining of various operations to increase accuracy and reliability.

The firm is most often introduced to new products because one of their clients has it in their stack and they are actually impressed by its performance. It integrates beautifully, solves a problem, is reasonably priced, and development is ongoing. “That last part is a must,” says Brazer. “The companies that we choose to work with must be nimble innovators. If they aren’t able and willing to make modifications to meet the changing needs of customers, they aren’t a good fit.”

Another requirement for Complete Controller is full integration. Brazer says it is rare when they find a solution that fully integrates with the central GL, but it does happen. Their latest experience with this occurred when the firm was introduced to ADPs Accountant Connect<sup>SM</sup> platform.

She describes the integration as “full, flexible, and under our control. Many payroll solutions tout full integration but when you get into real life scenarios you find that either you have to pay them to set up the mapping, which means you have to rely on them when the setup needs to be fine-tuned, or you have to use a bridge or connector that has its own quirks.”

## The Result

Complete Controller currently has a large client base supported by staff nationwide. They are seeing increased efficiency through automating their payroll reporting needs and seamlessly pushing this data into QuickBooks. Thanks to Accountant Connect, the amount of time they now save each period depends upon our customer’s payroll frequency, but on average they are seeing 15 – 30 minutes per client, per month.

“For us this is a very big deal,” said Brazer. “If that savings is spread across our entire client base at our bookkeeping hourly rate we will see a three percent increase in efficiency. Because we share portfolio profitability with our bookkeepers, this makes them happy too. Efficiency is great, but not at the cost of accuracy.”

In addition, the firm enjoys having the capability of ensuring accuracy through the GL mapping coupled with the increased efficiency.

## Lesson/s learned

For one, the firm learned that feature testing is a critical part of the app discovery process. "While products/app makers love to tell you about their value points, demonstrate them and even give you a free trial, they naturally may not be as forthcoming about the limitations," said Brazer. "And then there are undiscovered values. Things the provider didn't think to put forward as a top value proposition, that turn out to be the most important feature for your practice."

The firm found that when testing Accountant Connect, they didn't know or think to ask about its capability to handle customers that were not RUN Powered by ADP subscribers. They discovered later that the platform also supports their larger clients using the ADP Workforce Now® platform.

In addition, Brazer didn't know about a benchmarking feature since they were most focused on mapping and downloads capabilities. "Benchmarking turns out to be really cool and now that we know it's there we are incorporating a look at salaries into our year-end meetings with our customers."

## Next steps

The firm is strongly recommending ADP for payroll, HR & benefits solutions and is watching out for any future solutions to help their clients.

“Benchmarking turns out to be really cool and now that we know it's available in Accountant Connect, we are incorporating a look at salaries into our year-end meetings with our customers.”



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\*ADP Survey, March 2019.

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