



Growing beyond traditional accounting services with HR technology

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Automating Client Processes in Your Firm

Automating the most taxing of processes is something every practitioner is becoming familiar with, but exactly what and how remains a struggle, particularly when it comes to most back office work.

Heather Satterley, EA, MSI had been in the business of advising other firms on their own processes and needs through her firm Satterley Training & Consulting LLC. But this noble task also required that she was up on the latest tools and practices; ones she can trust will get the job done in the best possible way.

Below is her story of how she found ADP's Accountant ConnectSM platform worked best for these purposes and also made it a part of her own, recently launched bookkeeping practice.

Problem/Challenge

Having multiple firms who want tools that fit their firm's processes, needing ones that were scalable and meet the needs of many types of their clients and can streamline their processes.

Quick Facts



Heather Satterley
Owner/Founder

Name	Satterley Training and Consulting LLC
Industry	Accounting
Established	2017
Employees	1
Headquarters	Portsmouth, RI
Website	satterleyconsulting.com



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-Heather Satterley,
Owner/Founder



The Process

Because Satterley deals with multiple firms, when she chooses a vendor to work with or a technology stack she looks at several key factors:

- the firm (client) as a whole
- how easy the onboarding will be
- what training is available
- how easy the partner is to work with

Satterley had worked with clients that used ADP® and knew the RUN Powered by ADP® product as well as the integrations involved. So when ADP released Accountant Connect and made it completely free for accountants, she took the time to get to know, in detail what it offered before recommending it to any of her clients.

“For me the first thing that stood out (for my clients) was that it’s a huge opportunity for smaller firms due to the price point,” she said. “For me, that was a no-brainer. Not only do firms get to choose the type of relationship they want to have with ADP, they also get free CPE, the compensation benchmarking, and a tax library. All tools that change the game for a smaller firm.”

ADP had reached out to Satterley when Accountant Connect came out because they wanted to learn more about how accountants can better advise their clients on accounting technology. She personally helped them develop content to do that, mainly webinars for them that focused on what it looks like to advise on and evaluate technology.

Satterley said she was very impressed that they had created a platform that robust for accountants for free. “When I speak to my firms and they ask about technology, I say you need to sign up for this but it starts with payroll work and the levels you can work with ADP in that regard, but the platform is so much more.” She currently refers client business on to ADP.

The Result

In the past year since working with ADP on Accountant Connect, Satterley continues to have accountant clients come up to her or email her about how pleased they are to be on Accountant Connect. These firms now recognize they can offer services they may never have considered, like referring clients who want a retirement plan and being an advisor for their clients around HR and benefit-related matters, including the use of ADP’s compensation benchmark data.

"The compensation benchmark data is such a unique, powerful tool that we are excited to embrace in our practice," said Satterley.

"We plan to use it regularly as a value-added service to advise our clients on how their employee compensation compares to similar companies in their area."

Because ADP pays 1 in 6 people in the US, they are able to anonymously aggregate this payroll data and offer it back to accountants as a tool to help them advise clients on their employee compensation strategies.

Lesson/s learned

Entering the relationship with ADP, Satterley did not realize they have three revenue models firms can choose from: a referral model with revenue sharing for client referrals sent to ADP, a wholesale model, whereby the firm uses a white-label version of the ADP RUN platform to resell payroll & HR services and charges their clients directly, or ADP will buy a firm's payroll clients and service them. She said the last option is particularly attractive for those firms who do not want to continue handling payroll or are looking to get a valuation on how much the payroll portion of their practice may be worth.

Next steps

As mentioned earlier, Satterley just this month launched a new firm, Back Office Ally, a bookkeeping and tax practice. She said she plans to use ADP and their offerings for their clients.

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To learn more visit: adp.com/accountant

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