



Growing beyond traditional accounting services with HR technology

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# Getting Started With Payroll

CPAs and bookkeepers alike have long had a love/hate relationship with payroll, mainly due to previous experiences, misconceptions, and all around lack of knowledge about what the latest technologies and services are capable of.

For good or ill, the fact is 90 percent of accountants get involved with payroll in some capacity (ADP survey, March 2019). And with the right technology, payroll data can serve as baseline to more efficiently and proactively advise clients (integration with QBO, real-time access to data in the cloud, etc.), resulting in increased client communication and an entry point to offer additional services such as CAS, HR, process automation and more.

Williford Houston & Co CPAs, a small practice from Wilmington, NC was just such a firm. Payroll was something that they did as a valued client service, but it lacked efficiency and was prone to errors. This was until they began to research current solutions and received positive advice from a peer group, which ultimately lead them to ADP® and its services.

As you will see, the process and experience was not without its faults, but the results were well worth it, according to firm Partner Carl Williford, Jr. CPA. The below quotes and findings are from him and Staff Accountant Alton Harris, CPA.

## Quick Facts



Carl Williford, Jr.  
Partner and CPA



Alton Harris  
CPA

|              |                        |
|--------------|------------------------|
| Name         | Williford Houston & Co |
| Industry     | Accounting             |
| Established  | 1988                   |
| Employees    | 20                     |
| Headquarters | Wilmington, NC         |
| Website      | whccpas.com            |



Williford Houston & Co., CPAs, PLLC



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-Alton Harris, CPA



## The Problem

The firm's processes for preparing payroll were inefficient and varied by client, which led to several re-works, errors and general frustration. They also wanted to end the processing of after-the-fact payrolls, since most of them created an inordinate amount of notices. Moreover, they needed to streamline and create a consistent experience for their clients and payroll specialists.

## The Process

The lead team began reviewing several alternatives for preparation and delivery of payroll. They reached out to Rootworks, their main peer group, for additional input, ultimately being advised to check out RUN Powered by ADP® Payroll for Partners as a delivery platform for their clients. They began by processing firm payroll via this white-label, wholesale version of the ever-popular ADP RUN platform utilized by more than 700k small businesses to understand fully how client experiences would look. They also wanted a consistent process to allow the firm to cross-train its own payroll specialists to serve all of its payroll clients. The final piece of the puzzle came when the firm collectively agreed it was important to partner with a national brand to assure their clients that their payroll data was safe.

Onboarding is done paperlessly through ADP's digital client onboarding system which allows the client to complete their demographics, upload employee information and earnings records. The firm typically completes this process for the client and just sends the forms for them to electronically sign.

## Challenges Faced

The onboarding process took anywhere from 2-3 weeks as the firm gathered and verified client data to securely hand off to ADP's onboarding team. There was "a bunch of back and forth in completing the whole process," according to Harris, as both parties worked together to ensure every last detail was corrected before the first set of payrolls ran. "Usage of ADP once the client is setup and edited is very user friendly and efficient," according to Harris. "We require our clients to enter the time for their employees and we review and process the payroll. The payroll reports are posted to the client's portal for them to view or print."

## The Result

Today, the firm processes payrolls much more efficiently with less bottlenecks due to staff availability. In turn, this has allowed the firm to pursue more monthly accounting, bookkeeping and consulting engagements. Generally, these consulting engagements come out of monthly BOSS (back office support services) clients, with whom the firm works with. "The beauty of the BOSS engagements is that we learn nearly all of the client business processes," said Williford. "Many times we identify inefficiencies and/or redundancies in processing, which lead to addition consulting or implementation work. The hardest part of the BOSS model is helping the client understand what is and is not included in the BOSS engagement."

## Lesson/s learned

The firm has had to work on their own onboarding process, which was a bit disjointed at the beginning. They are also still working on the process to handle and monitor any payroll tax notices. "We definitely wish we had made the decision to switch earlier. We currently have 62 clients in ADP RUN," said Williford.

## Next steps

The firm is in the middle of its next steps. They promote the use of ADP RUN in its sales proposals and are hoping for more prospects.



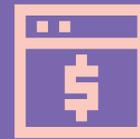
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