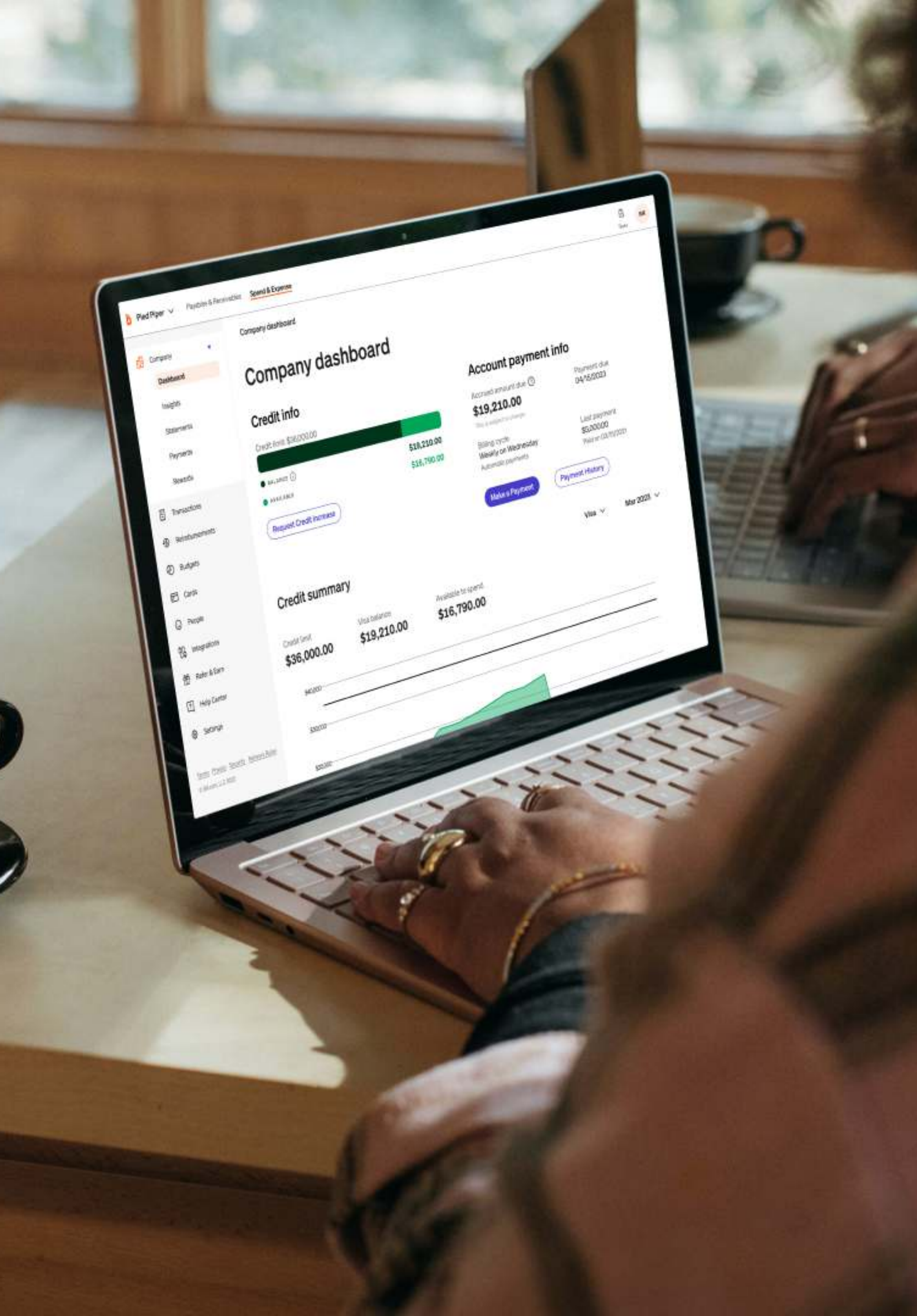




# 7 stories of successful spend management automation

Learn what works for real accounting firms





THE ACCOUNTANT LOOKBOOK FOR

# BILL Spend & Expense

BILL Spend & Expense optimizes operations for accounting firms by automating manual tasks, integrating seamlessly with accounting software, and providing real-time visibility into client spend. Here are 7 firms that have utilized BILL Spend & Expense to save time, improve internal operations, and gain the insights they need to deepen relationships with their clients.

## Select a story

- 01 Eliminating the need for reimbursements and expense reports
- 02 Controlling spend before it happens
- 03 Closing the books on time, every time
- 04 Empowering staff with technology
- 05 Creating peace of mind for clients and partners
- 06 Strengthening the relationship between client and accountant
- 07 Staying ahead of spend management



# Eliminating the need for reimbursements and expense reports

RLJ Financial Services Inc. is a full-service accounting and wealth management firm that works in the healthcare and agriculture space.

[READ THE CASE STUDY](#)

“It used to take a card holder 1 to 5 minutes to complete a transaction, depending on the volume and the size of the business. With BILL Spend & Expense, it takes about 11 seconds.”



**Caleb L. Jenkins**

EA, CQP, Leader of Client Accounting Services

## **Before** BILL Spend & Expense

- Clients had unwieldy reimbursement and expense reporting processes
- The back office had to spend time figuring out what every transaction was for
- Duplicate transactions in QuickBooks from multiple credit card receipt apps and bank feeds

## **After** BILL Spend & Expense

- Reimbursements and expense reporting were eliminated
- Cardholders upload receipts and automatically categorize transactions
- Seamless integration with QuickBooks
- Dashboard for immediate visibility of all spending
- Books can be closed by the 3rd of the month





# Controlling spend before it happens

Squire & Company is a full-service accounting firm serving clients in professional services, construction, technology, direct selling, consumer products, and more.

“With BILL Spend & Expense, your employees are 100% accountable every time they spend anything.”



**Megan Bronson**  
Advisory Partner



## **Before** BILL Spend & Expense

- No real-time visibility into spend
- Clients were left to react to month-end statements after the fact
- Firm spending too much time manually reconciling credit cards, reimbursing employees, and tracking down receipts

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## **After** BILL Spend & Expense

- Real-time visibility into spend every step of the way
- Shifted from reacting to spending to controlling spend before it happens
- Traditional reimbursements and expense reports were eliminated
- Freedom from tedious manual tasks
- More time for strategic work that establishes firm as a trusted advisor

# Closing the books on time, every time

Summit CPA, a Division of Anders CPAs + Advisors, was founded in 2002 to serve as the virtual CFO for small to medium-size companies.

[READ THE CASE STUDY](#)

“If it were up to us, we would have all our clients run on BILL Spend & Expense.”



**Jake Grimm**  
CPA, Director of Technology

## **Before** BILL Spend & Expense

- Out-of-date budget information
- Critical information was constantly missing
- The firm was constantly waiting for expense reports
- Constant delays when trying to close the books

## **After** BILL Spend & Expense

- Costs applied to the right budget and in the right category
- No need to manually hunt down and code transactions to the right budget
- Expenses are now automatically coded
- Real-time visibility into spend and budget control
- Books are closed accurately and quickly

# Empowering staff with technology

Lescault & Walderman Accounting is an international firm with business offerings ranging from financial services to technical implementation.

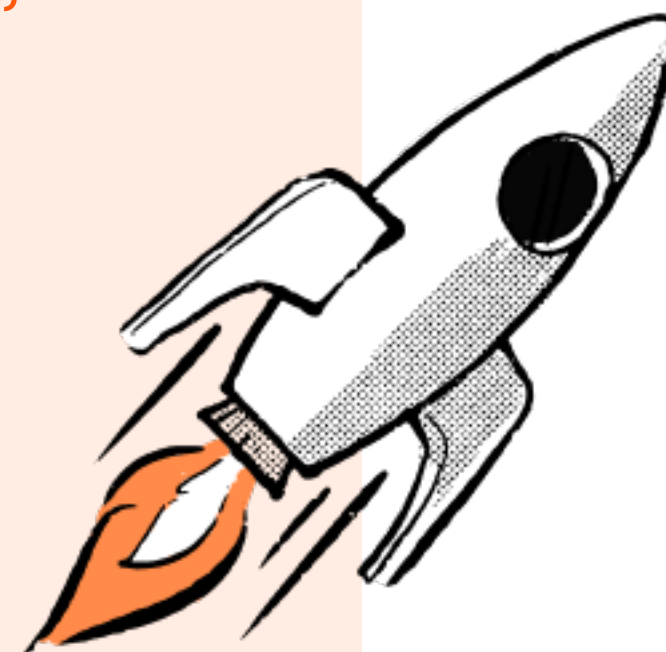
[READ THE CASE STUDY](#)

“BILL Spend & Expense is easy to manage, easy to deploy new cards, and easy to deal with customer support. For us, that is the way we win.”



**Matthew Lescault**

Founder & President of Lescault & Walderman Accounting



## **Before** BILL Spend & Expense

- Syncing and integrating with accounting software was problematic
- Extra time spent on administration work
- Credit cards were difficult to manage, and customer support was lacking
- Chasing down receipts, coding, and reconciling credit cards was a nightmare

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## **After** BILL Spend & Expense

- Increased efficiency by reducing hours of manual data entry
- Credit cards deployed quickly and easily to staff members
- Control all team budgets through a single app
- Virtual cards eliminate coding by moving expenses into the accounting system
- Clients can do everything in real-time instead of chasing down a paper trail



# Creating peace of mind for clients and partners

Breakwater Accounting + Advisory provides back-office support and technology solutions for small-to-midsize businesses and nonprofits.

[READ THE CASE STUDY](#)

“The value of the relationships we build with our clients is the same type of relationship we want with our technology partners, and we have that with BILL Spend & Expense.”



**Amy Marshall**  
Director of Workflow Solutions

## **Before** BILL Spend & Expense

- Reactive expense processes
  - Multiple methods for managing expenses and reimbursements
  - Reconciliation was very manual and time consuming
  - Lack of visibility and control
  - Exposure to fraud
- 

## **After** BILL Spend & Expense

- Proactive and intentional expense processes
- Real-time visibility and control
- One place for all expense management
- Seamless integration with accounting software
- Less time spent on reconciliation
- Fraud control with virtual cards



# Strengthening the relationship between client and accountant

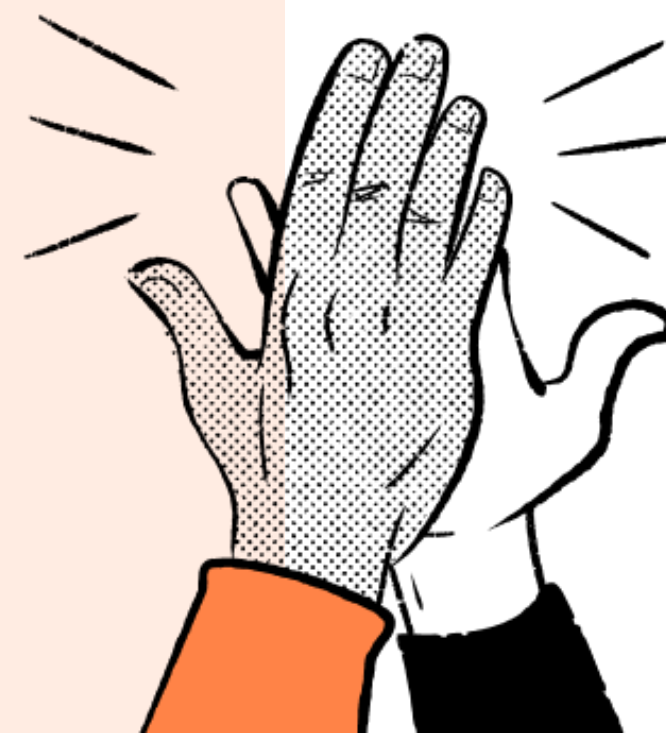
Serving as the accounting firm for small businesses, Ignite Spot Accounting bridges the gap between CEOs and accountants.

[READ THE CASE STUDY](#)

“BILL Spend & Expense allows us to completely change the way we interact with clients to the point to where we are adding value to the conversation based on the enhanced information we have at our fingertips.”



**Dan Luthi**  
Ignite Spot Partner



## **Before** BILL Spend & Expense

- Manual reconciliation across multiple systems required time-consuming, error-prone data entry
- Days were spent chasing receipts and missing transactions
- Software platforms were disorganized, thus hard to manage consistently
- Firm encountered blind spots in clients' cash flows

## **After** BILL Spend & Expense

- Client relationships have improved
- Cash management solutions are now proactive
- Reliable partner support
- Increased advisory and coaching services
- Intuitive, clean platform interface for easy set up and use



# Staying ahead of spend management

Chaney & Associates provides outsourced accounting and business management consulting services to churches and faith-based nonprofits.

[READ THE CASE STUDY](#)

“Now we are always in front of spend management instead of behind it. That’s what technology has done for us.”



**Steve Chaney**  
Founder & Advisory Partner

## **Before** BILL Spend & Expense

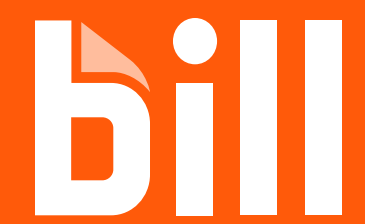
- Credit card tracking and expense management was a slow and tedious manual process
- Financial statements presented 45-day-old data
- Clients were unable to provide credit card reconciliations, receipts, and coding
- Staff working over-time and weekends
- No value in spend management

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## **After** BILL Spend & Expense

- Reconciling credit cards now takes minutes per month instead of hours
- Single administrative dashboard where all clients are listed and credit cards are managed
- Automated notifications identify missing fields
- Weekly closes
- Spend management made relevant and in real-time





# Join the BILL Accountant Program

BILL Spend & Expense can help your firm provide better insights to clients and close the books faster than ever. Learn how you can optimize accounting operations by automating manual tasks, integrating with accounting software, and gaining real-time visibility into client spend.

JOIN NOW

