

# BookKeeping Express Improves Lives with Client-attuned Technology Solution



## BookKeeping Express

Keith Mueller, CEO, BookKeeping Express, Tysons Corner, Virginia  
Complete financial transaction processing, 26 employees

BookKeeping Express understands that most business owners would prefer not to spend their precious time managing all of their financials.

The firm is working every day to find ways to make financial transaction processing simple, timely and affordable for clients and their businesses. BookKeeping Express drives value for its clients by combining technology, people, and a national presence to give small and medium businesses the full range of financial transaction processes including general ledger, cash management, merchant services, payroll, and reporting.

Experience in more than 25 industries with a special emphasis on franchisees

Uses Bill.com Accounts Payable, Accounts Receivable

Accounting system:  
Xero & Intuit QuickBooks Desktop and Online

## Cloud-based Bill.com Gives Control Back to Clients and Minimizes Back Office Processes

### Introduction

BookKeeping Express has a strong history of helping its clients fine-tune and add value to important financial processes.



As CEO Keith Mueller explains it: “We were established in 1984 as a licensing company and offered documents and procedures to individuals on how to create a bookkeeping company. In 2008, the organization evolved into a franchising company. Now, we are moving toward adding more value-driven services beyond franchising that include financial transaction processing like bookkeeping, payroll, cash management, merchant services, and management reporting. We strive to make it simple for our clients by consolidating their financial processes to only five minutes a day. By adopting and relying on cloud-based technology, we can accomplish this by reducing data entry and manual processes.”

The firm, based in Tysons Corner, Virginia, focuses on small and medium-sized businesses throughout the United States and has a special emphasis on helping franchised business owners. The firm itself offers franchising opportunities and has more than 40 franchisees working within their territories to provide a local connection to their communities.

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## Challenges

- Paper-driven processes that dramatically increased the time needed for review and approval
- Lack of integration with clients' general ledgers
- Inability to expand service offerings due to staff and technology limitations

## Solution

- Bill.com Accounts Payable and Accounts Receivable

## Results/Benefits

- Cut timeline in half for invoice review and approval
- Cloud-based technology integration with solutions such as Xero & QuickBooks
- Ability for the firm to offer expanded services and increase firm profits

## Clients Challenged by Broken Processes

The firm's clients held a common denominator when it came to challenges.

"There are 30 million small businesses, and we need to help them grow," explains Mueller. "Small businesses spend 50-60 percent of their time in the back office. We need to get them out of there to be successful."

"We recognized that our clients were struggling with bill pay and invoice processes," continues Mueller. "We would see it with different technologies and variations our clients were using. Regardless of their bank or homegrown technology, there was often a lack of integration, and processes were really broken. One client shared that he had to touch paper nine times a day and took six weeks to get invoices out the door. Clearly, there was an opportunity to reduce and repair those processes and the technology that supports them so that our clients could get back to doing what they love – running their businesses."

BookKeeping Express works with multiple technologies, including QuickBooks, Xero, ADP, and Qvinci. However, it needed a robust solution that would be cloud-based, easy to use, and able to integrate with multiple technologies.

"A lot of our clients were using bank technology that didn't integrate, which would impede the building of smooth and sustainable processes. We tried Anybill, but ultimately that didn't work for our firm," says Mueller.

## Finding the Right Technology

Finding the right technology to help clients improve processes became a priority for BookKeeping Express.

"I was looking for a solution that allowed clients to move away from a paper-based review and approval process. It needed to make data entry easier, provide notifications, and make the approval process easier as well as integrate with general ledgers," explains Mueller.

The right technology, according to Mueller, had to be based in the cloud.

"With our focus on clients coast to coast, we had to find a cloud-based solution. Beyond integration with general ledgers, we needed open APIs as well so we could customize our clients' portal," says Mueller.

The CEO turned to a variety of established colleagues for options, and several referred him to Bill.com. He was quickly impressed by its ability to automate key processes.

"I received other solution recommendations, but ultimately their processes weren't attuned from a client perspective or the companies didn't have some cultural aspect that I've come to appreciate from Bill.com such as thought leadership and superb customer service," says Mueller. "Honestly,

I love the notifications. Bill.com has the ability to move processes in an automated fashion. That is a big deal.”

Another offering from Bill.com impressed Mueller as well.

Bill.com also met the firm’s need to customize its online client service experience.

“I value strong relationships and customer service. Bill.com excels in both areas.”

“We do some of our own coding for a client portal, so any solution we adopted needed to have an open API,” explains Mueller. “The Bill.com portal would tie into our own so we would be able to provide a one-stop environment for our clients that showed open bills and approval for bills in one simple screen.”

The firm moved forward with adopting Bill.com.

“We got Bill.com up and running for our first client in hours. We tested it by having one of our client’s off-site personnel note an expense in a spreadsheet. It was then routed for approval by that division’s boss, and the workflow continued from there – all built directly from the guy in the field,” says Mueller. “We are now moving toward using Bill.com for all client accounts.”

## Introducing Simplicity and Automation with Bill.com

“BookKeeping Express has gained multiple benefits from Bill.com. We’ve seen our clients’ time and costs related to bill pay and invoicing decrease. We’re also seeing the firm’s internal price point for these services go down as well so we’re realizing greater revenue from the same activities,” says Mueller.

Beyond time and cost decreases, Mueller cites another Bill.com plus.

“Life got easier for our clients with Bill.com. The processes were simplified on the client side so that they feel like they are more in control. Our clients are

absolutely getting faster information. Processes are no longer driven by paper – who has it, where it is piling up. Bill.com made the process simpler which means less stress and more control for everyone involved,” explains Mueller.

Bill.com has also enhanced the BookKeeping Express client portal.

“With Bill.com, clients have their own portal that allows them to access information on bills and invoices they entered and which ones need approval. They can drag and drop documents into the portal as well as approve payment or find due dates. Most of our clients are getting their bills and taking care of them through Bill.com,” explains Mueller.

Bill.com benefits extend within BookKeeping Express as well.

“We are saving time internally. The integration with general ledgers is huge. We now have a repository of data not tied to a specific data entry place. We added bill paying and invoicing services and haven’t changed the cost to our clients,” comments Mueller. “Bill.com also allows us to recruit new clients and work with them at the same level of service without adding more staff members. We’re giving our clients a one-stop shop thanks to Bill.com.”

When asked if he would recommend Bill.com, Mueller responds positively.

“I would absolutely recommend Bill.com. I do it all the time.”



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