



AICPA Trusted Business Advisor Solutions



Cloud-Based Accounting Services
and the Next Generation
Accounting Firm



Jason M. Blumer, CFE, CPA.CITP, is the President and Managing Shareholder of Blumer & Associates, CPAs, PC. Headquartered in Greenville, South Carolina, Blumer & Associates is a pioneering, forward-thinking accounting firm that has embraced social media, cloud-based technologies and a virtual firm mind-set to service clients all over the world. Jason is also the founder of THRIVEal +CPA Network (www.THRIVEal.com), which helps younger CPAs move into firm ownership.

Jason's experience includes auditing governmental and non-profit entities, assisting small business clients with the management of their operations, assisting clients with budgeting and detailed financial analysis in particular service industries, and oversight of all related tax projections and preparation for each client.

Accounting Firm Seeks On-line Solution to Automate the Bill Management Process

As a technology "evangelist" for CPAs, Jason Blumer has been at the forefront of accounting firms that have embraced the newest technologies. Jason is always looking for ways to keep his firm and his clients more profitable, more productive, more efficient, and in the technology vanguard.

Early on, Jason identified bill pay management and the accounts payable process as a time- and labor-intensive area that could benefit from automated paperless technologies. Like many other firms, bill management and the A/P process comes with a host of challenges for a firm and its clients, including the timely receiving, approving, and tracking of bills; bills getting lost; tedious data entry; lack of a standardized process; and fraud risk.

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Jason M. Blumer
Blumer & Associates
CFE, CPA.CITP, President and
Managing Shareholder

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Driving Greater Efficiency, Improving Client Collaboration and Increases Profitability

Bill.com, a paperless bill management solution, enabled Jason's firm to automate the bill management and A/P process. Through this cloud-based service delivery platform, Jason's firm is able to set up their clients on Bill.com and create a standardized digital workflow for submitting, approving and paying bills electronically. The data synchronizes with their accounting package and helps their clients better manage cash flow. By automating the bill pay process, Jason's firm has experienced an increase in staff productivity, reduction in non-billable hours and enhanced client collaboration.

Identifying a need for businesses to operate more efficiently and move towards a paperless environment, Jason's firm began to offer “CoreCloud” consulting services to its clients. When getting clients to see the value of online bill pay and a new and better way of doing things, Jason and his staff handle it this way: “We don't try selling Bill.com alone. Rather, we sell a total mind change to our clients about the benefits of cloud computing in general.

I'm just amazed at what the Cloud can do for our firm and for our clients. So before we take a client into the Cloud with the goal of full integration of bill pay, A/P, A/R, we first assess their business processes, identify inefficiencies and determine their needs. We come to our clients with a brand new thought process – which can take a lot of time answering questions about the process, the Cloud, security, etc.”

Although Blumer & Associates has been around for a long time, Jason has transformed his father's practice into a new firm, leveraging technology and innovative practices to serve a new generation of clients. Cloud-based solutions like Bill.com help Jason and his

firm attract younger business owners who seek fresh ideas, new technology, and innovation from accountants that mirrors what they are doing in their own entrepreneurial businesses. Many of his younger clients use social media tools from Facebook to Twitter to e-newsletters on a regular basis. Clients that are tech savvy are usually very open to new ways of doing things as well. “I tell my clients that Bill.com will blow your mind and it usually does.”

How Bill.com Protects Small Business Clients from Fraud

Based on a 2010 Report from the Association of Certified Fraud Examiner (ACFE), on average small businesses lose 5% of annual revenue to fraud. Accounting departments experience the largest percentage of fraud with check tampering and billing as the easiest type of asset misappropriation. As a certified fraud examiner, Jason has identified Bill.com as an invaluable tool for his small business clients in establishing internal controls in the A/P process to mitigate the potential for fraud and asset misappropriation.

“When you operate in the cloud with a system like Bill.com that delivers security, it takes away things that can be manipulated because it's a digital process and no one can access anything without their user-restricted access code.”

Streamlining the A/P Process with an Online Bill Pay Solution

24/7 Access: Because Bill.com is web-based, you always have access to this service anytime, anywhere. As Jason says, “With the CPA Console, I login once to access all of my clients. Having it all in one place is a really great convenience. We help our clients get their invoices into Bill.com and then we take it from there. It's just awesome. We're getting great response from clients, too. Everything syncs together with

their accounting software. My clients are very impressed. Having all client documents and processes securely available anywhere in the Cloud is an incredible benefit.”

Improved workflow:

Both Jason's firm and his clients have experienced more efficient workflow processes thanks to the automated simplicity of client bill pay. Jason states, “With Bill.com, we have the ability to customize the workflow based on how our clients want to work with us. How can you compete with that? Many clients that can't afford an accountant, often get a bookkeeper. But Bill.com eliminates the bookkeeping data entry middleman, too.” It's not just Jason's clients that have experienced increased productivity, Jason's staff have experienced an increase in productivity as well.

Automating the bill payment process:

Bill.com also automates the entire bill payment process, saving staff and clients time and reducing errors. Jason observed, “One of the main benefits for my clients is that they don't have to write and print and mail checks anymore. We can pay all their bills electronically. No more printing and signing checks. We can manage the whole process (from entering and coding the bills, to scheduling and approving the bills for payment and synchronizing the data into their accounting package). There's nothing our clients have to do, unless they want to.

Increasing the firm's profitability:

Jason's success with Bill.com extends to the bottom line as well. That's because this solution helps automate routine tasks and allows his staff to focus on higher-value/billable work. “As our firm grows, my staff doesn't have to grow. As we add new clients, some staff members actually have less to do thanks to Bill.com. So as we continue to grow, we'll actually be able to do more with less staff.”



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