

Customer Success Story

Polay + Clark Use Bill.com to Build Trust with High Net-Worth Clients

In this interview with Bill.com, Polay + Clark’s Jimi Stout, cloud ecosystem director, and Tate Henshaw, project manager, discuss how Bill.com has helped them build trust and standardize.

Tell us about your firm.

Tate: Founded in 1999, Polay + Clark focuses on entertainers and sports players. We work like a family office, but also offer traditional CPA services.

How has leveraging Bill.com improved your workflow process?

Tate: When we started exploring the cloud, it quickly became apparent that Bill.com was the leader in payables. We handle 20-30 payments a day for clients. We would have to email Excel spreadsheets listing bills, send scans, and coordinate payment amounts. There was always confusion. Now, clients swipe to approve or deny bills on the Bill.com mobile app. They really enjoy the convenience. I call it the Tinder of payables.

Jimi: Using the Bill.com interface eliminates the inconvenience of using multiple online banking portals to process a bill payment.

What’s your Bill.com ROI?

Tate: When dealing with high net-worth individuals, business is built on trust. Bill.com helps build that trust through transparency. Clients can see and approve every bill and every single transaction if they want.

Bill.com has expanded our employees’ capacities. They aren’t bogged down in creating Excel lists or reconciling transactions. They concentrate on being advisors and looking at cash flow, estate planning, and how to save money.

Jimi: If someone needs payables, we’re going with Bill.com. We can get a bill in and out in two minutes if needed.

What tips would you give firms that want to improve business?

Tate: Streamline your processes and train your staff. It’s easy to bow to every client’s demand and use 400 different systems and banks. But if you want to scale, that’s not a sustainable model.

POLAY+CLARK

TYPE OF FIRM

Accounting Firm

EMPLOYEES

22

HQ

Atlanta

INDUSTRY FOCUS

Entertainment, sports

CLIENTS

800

BILL.COM SERVICES

AP & AR

INTEGRATIONS

Xero, Hubdoc

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