

Dext

Case Study

Breakwater Bookkeeping

Driving growth during a pandemic by developing a client-centric tech stack

Powering modern bookkeeping
with Dext



“I’m able to do the work that I love, which is supporting business owners, and I’ve been able to successfully do that remotely, which has been integral to business operations while navigating this pandemic.

Also, because of software like this, I have onboarded clients that I have not yet met in person, and Dext made that possible.”



Amie MacNeil

CPB, Founder
Breakwater Bookkeeping Inc



About

Amie MacNeil has been in the bookkeeping industry for just under a decade. Four years ago, Macneil decided to embark on starting her firm, [Breakwater Bookkeeping](#). When Amie entered the bookkeeping space, she followed the traditional route - using paper, setting up drop-offs, and implementing a physical filing system for her clients. Amie continued to explore options for boosting productivity and increasing efficiency for both her team and her clients. Two years into her firm’s existence, she found Dext and deployed it as a solution to help power her firm’s growth.



Opportunity

Amie used a primarily physical bookkeeping system, accepting boxes of receipts and meeting with clients in person. This all changed with COVID when the Breakwater Bookkeeping team leaned on Dext to help service her clients in a new environment. The pandemic forced them to dive deeper into modern bookkeeping and start deploying new techniques to ensure a consistent level of service even though everything was now virtual. They had to adjust quickly and ensure that Breakwater Bookkeeping addressed their client’s needs thoroughly.

In addition to servicing current clients, Amie needed a tech stack that would make new client onboarding a breeze. Without meeting her clients in person, she needed to ensure that whatever she used would be easy to deploy and train over phone calls and zoom meetings. Amie found Dext just over two years ago and slowly began to roll it out for her clients. She saw the use of digitization and integrations with the top accounting software but didn’t fully see the value until diving deeper into the product during the pandemic.



Solution

Amie discovered that with Dext, there is more than meets the eye. She realized that she had only touched the surface when it comes to functionality—relying on the digitization and integrations present to do the heaviest lifting. As her team deployed Dext across more users, she began to explore more of the features available. Amie began to understand all of the things she could deploy to help her clients and shared how she is excited to continue diving deeper and become a Dext power user. Learning about the power of tools like Invoice Fetch, Supplier Rules, and more recently, expense reports. There was a wealth of resources at her fingertips and she was able to find out how she could harness them to drive value for her clients.

Amie noted that with Dext in her corner, she would take on clients she wouldn’t otherwise have been able to service. With Dext, Breakwater Bookkeeping could save hours per week on client work because of the productivity boost they received. Amie shared a client story in which she completely modernized a client’s process allowing them to go from needing 100 hours a month to a few hours with the power of Dext.



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Result

With Dext, Amie has developed a client service model that allows Breakwater Bookkeeping to empower their clients to grow. For Amie and the Breakwater team, the priority is to make sure that the process was smooth and seamless for their clients. Even throughout the pandemic, the Breakwater team was amazed at how much Dext was able to keep the flow going for her clients.

Amie shared that she could use Dext for everything her firm needed. It provided her the ability to facilitate client communication and data organization which allowed her to still interact with clients in a meaningful way. With less face-to-face interaction and a centralized data hub, she could do more work in less time, allowing her to facilitate the sustained growth that her firm has experienced over the past year.



Impact

For Amie, her favorite thing about working with Dext is the enablement of remote work. She shared, “I’m able to do the work that I love, which is supporting business owners, and I’ve been able to successfully do that remotely, which has been integral to business operations while navigating this pandemic. Also, because of software like this, I have onboarded clients that I have not yet met in person, and Dext made that possible.”

With her newfound appreciation for the scalability and flexibility that comes from cloud accounting, Amie hopes to continue to grow her firm’s client base and onboard even more clients that appreciate their emphasis on utilizing technology.

In addition to growth, Amie is preparing her business to tackle the next biggest challenge she sees in the field: Advisory. Amie shared, “As we recover from this pandemic, it will be imperative that we, as accounting professionals, have the tools we need to advise our clients and strategize a plan for moving forward.” To do this, Amie looks to the tools in her stack to continue to provide additional features to help firms like Breakwater Bookkeeping continue to deliver the services they need to help their clients thrive.

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advisory?**

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