

Dext

Case Study

Foray Business Group

How FBG increased internal workflow efficiency by 20% with Dext

Expanded client services
with enhanced bookkeeping practices



In a world where everything changes, we were able to be that one consistent thing that our clients relied on.”



Jessica Farmer

Co-founder & COO
Foray Business Group



About

Foray Business Group (FBG) is a partnership of professionals that support businesses of all types across the United States. A dream for co-founders Elizabeth Bergen and Jessica Farmer, FBG serves as a dedicated partner to their clients by focusing on client education and a service-first approach. With Dext, FBG has massively expanded its client portfolio, enhanced the level of service provided, and increased productivity by 20% by reducing manual internal workflows.



Opportunity

When creating Foray Business Group, Elizabeth and Jessica knew that they were on a mission to revolutionize how businesses view and interact with their accountants and bookkeepers. “We knew we wanted to be in this space; we didn’t just fall into it,” shared Jessica. With that passion, Elizabeth and Jessica came together to create FBG and began serving their clients.

However, soon into their venture, they realized that there had to be a more efficient method to collect data from their clients. Jessica recalled that their original process was time-consuming, extremely manual, and more often inaccurate. And in addition to simplifying the data collection process, they also wanted a digital tool that would accommodate and enhance their virtual workplace.

With such an extensive list of the features necessary to conquer, Foray Business Group must find a tool that would scale with them as they continued to expand their client portfolio.



Solution

Foray Business Group discovered Dext and immediately began leveraging the robust suite of tools to deliver faster results for their clients.

Foray, Dext provided the answers to some of their most critical answers when searching for a solution built for their clients. Dext was able to provide a feature-rich platform and did so in an easy-to-use format. One of the things that FBG found most impactful was how quickly clients could get onboarded with the Dext platform. Having to train a team and clients on a new software always takes an initial upfront investment of time, but with Dext, the implementation was smoother than they could have ever anticipated.

As Foray Business Group began diving deeper into the advanced features that existed within the Dext platform, they discovered it allowed them to provide even more value for their clients than they originally had imagined. Utilizing invoice fetch to speed up common vendors for their clients allowed them to optimize workflows. This small setup decreased the weekly time spent on the time-intensive data entry tasks and instead allowed Jessica to focus on value-add services like advisory.



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Elizabeth Bergen
Co-founder & CEO
Foray Business Group



Result

With Dext in their corner, Foray Business Group could now radically expand their service portfolio and scale their team to provide additional value to their clients. This boost in productivity from implementing Dext allowed FBG to shift their internal structure to serve their clients better.

Today, this structure enables the dynamic owners to focus on what they do best. Elizabeth is free to serve as the day-to-day client onboarding specialist, while Jessica has moved to a more advisory-focused role. Their goal is to provide an excellent client experience from start to finish, ensure this by providing a dedicated account manager, onboarding support, and personalized advisory services.

Through this dramatic shift in staff structure, the team prioritized building their business, attracting new clients, and developing more optimized internal workflows to sustain growth throughout the pandemic. This entire process also allowed them to focus on building a practice that promotes transparency and visibility and provides their clients with the ability to be self-sufficient at all times. “We want our clients to be able to pull reports, to see their data. We want them to have that visibility,” Elizabeth shared.

But what was essential for them was providing a continuously high level of service for their clients throughout the pandemic. Jessica shared, “In a world where everything changes, we were able to be that one consistent thing that our clients relied on.” With Dext, they could continue to provide the services they needed to survive and even onboard new clients.



Impact

Dext has allowed Foray Business Group to reimagine the future of their practice. With the boost in productivity, profitability, Foray shifts their focus on what can be possible in the future. Their goal is to expand their client portfolio by at least 80 clients over the next few years and continue to empower them to be financially sufficient and knowledgeable through the services they provide.

**Ready to
redefine
business
advisory?**

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