



Dext Emma Fougere, Connect CPA

Connect CPA set out a mission to be paperless,
and Dext provided the platform they needed to succeed.

Meet Emma Fougere



As the Head of Technology & Onboarding at ConnectCPA, Emma Fougere, CPA knows the importance of a reliable tech stack in any business today - especially in a remote- and digital-first company.

Most of ConnectCPA's employees live and work across Canada and there's also a small team in the Philippines - therefore, using the best software is essential to streamline everybody's workloads and, of course, best serve their clients all over the country.

"It's an exciting time to provide technical solutions to streamline workflows for firms", she says.

As the leading technology solutions in the team, Emma works with a wide list of clients and finds the best solutions for each unique client, helping them streamline their business's workflows according to their needs.

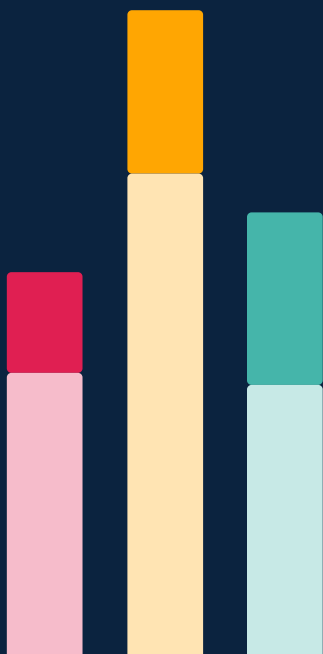
The Opportunity

Offering clients the most accurate cloud-accounting services on a remote-basis

ConnectCPA has always been focused on providing a modern, completely digital array of services. To make this remote-first foundation possible, they needed to find the right cloud-accounting solutions that worked for them and their clients.

They use Xero as their main accounting system, so the team needed the peace of mind that whichever app was added to their tech stack could work efficiently with the general ledger and streamline workflows.

Completely removing manual entry to save time and accuracy was of course in their mind, but they knew technology could take them further. Apart from that, ConnectCPA was looking at solutions to improve efficiency, provide better in-depth reporting and insights for clients and even manage pricing to remain competitive.



The Solution

Finding the best technical solutions for the team and for clients

Since researching and testing accounting automation tools in 2014, the ConnectCPA team has been an avid user of Dext products.

Dext Prepare, Emma explains, woos clients with its ability to extract data from receipts and invoices at an incredibly fast rate whilst maintaining accuracy. The “supplier rules” is a favorite feature amongst the team.

It didn't take long for them to discover Dext Precision and its powerful insights and reporting capabilities, which clients find extremely helpful.

The ability to re-code for clients using Precision has helped scale how their clients use their services significantly.

Last but not least, Dext Commerce has become another addition to Emma's tech stack, helping the team deal with a high volume of sales transaction data from digital commerce clients. The ConnectCPA team particularly likes using the inventory tool.



The quality is top-notch and has changed the way we work overall.



The Impact

Using technology to extract information, process transactions, analyze client data, and so much more whilst being fully virtual has given the firm the competitive advantage they were looking for.

Now, ConnectCPA is able to process around 20,000 documents every month with Dext Prepare, a crucial part of their tech stack. Using Prepare since day one for bookkeeping has been their main source for financial safekeeping.

No one needs to gather pieces of paper anymore - both the ConnectCPA team and their clients are very satisfied using Prepare with the hassle-free ability to snap and upload receipts into the cloud and send them straight into Xero.

“The Dext products we use daily help extract and manage data very quickly and efficiently.”

At the same time, Dext Precision has made it easier for Emma and the team to monitor accounts and streamline processes, allowing them to be more proactive and efficient. As a result, they have extra capacity for advisory work, which is so valuable to their clients.

They have also been able to provide more accurate pricing and onboarding: the activity insights feature has significantly helped ConnectCPA monitor the transaction volume of their clients. For example, if a client tripled their volume of transactions in the last 6 months, the firm can update their client’s pricing using the reporting and insights tools that Precision provides.

With Dext Commerce, ConnectCPA can save hours by automatically fetching and standardizing sales data from digital commerce clients, whether they operate online or have a physical store. With a detailed picture of their business performance, Emma and the team can provide better support and advice.

“I see Dext helping us grow and continue being an integral part of our tech stack. We see our business growing and adding all the efficiencies we need to best serve our clients remotely.”



The Dext products we use daily help extract and manage data very quickly and efficiently.



This case study was obtained as part of a series of interviews conducted with partners who were given a small token of appreciation for participating.