

Dext

Case Study

Open Book Consulting

Driving Client Success
Through Education with Dext

3X more Revenue Generated
2X clients onboarded



Consulting and advisory play a big part of my practice, and I continue to see it growing. We aren't just talking about financial development, but we are talking about how we can diagnose what's happening on the operational and organizational sides of their business through their finances.



Debbi Allison
Owner & Sole Proprietor
Open Book Consulting



About

Debbi Allison is the owner and sole proprietor of **Open Book Consulting**, a digital firm that serves clients across the U.S.. As a sole practitioner and entrepreneur, Debbi pays special attention and keeps her ears to the ground when it comes to the latest and greatest in the tech space to ensure that she keeps her tech stack as updated and optimized as possible.

With over a decade of experience, Debbi focuses on providing her clients with the education they need to become comfortable looking at and managing their finances. With a particular focus on industry trades, Debbi has molded her business to focus on providing fast and accurate services for her clients no matter where they are.

As a veteran Dext user with over five years of experience, Debbi utilizes our platform as a critical piece of her tech stack, allowing her to no longer have to deal with paper trails and lost receipts. Dext enables her to focus more on teaching her clients on creating workflows that allow them to make better decisions to keep their businesses running smoothly and successfully, especially during the COVID-19 Pandemic.



Challenge

When COVID-19 entered the scene in early 2020, Debbi was already well-positioned to continue providing exceptional service to her clients. Debbi's main challenge was ensuring that her clients still have the learning opportunities they had when she met with them in person.

With Debbi's diverse pool of clients, she takes a proactive approach to ensure that her clients are well onboarded and ready to use Dext for their documentation. Her goal is always to ensure that her clients upload their receipts before the sun gets to it. With her clients being mostly entrepreneurs and startups in nontraditional spaces, it was even more critical for Debbi to find the perfect solution that allowed her clients to upload their receipts and documents wherever they were.



My clients don't have the time to do all the bookkeeping themselves, but they need to be aware of the process. Using a method like Dext, they are aware of the process and touch their receipts more than once. They are engaged in the process.



Solution

Debbi was able to find that solution in Dext's platform. With its easy-to-use interface and the high convenience brought by the mobile interface, Debbi found the perfect tool she needed to bridge the gap for her clientele. Debbi was able to create a workflow that worked for her clients in and out of the office.

Debbi did an immense amount of research before deciding on the platform that made sense for her firm. She needed something that she could deploy that would be easy to teach but still had the robust functionality that would save her firm time on the bookkeeping end.

Debbi found the perfect mix of autonomy for her clients, as well as control for her practice, in Dext. The tool provided all the functionality she needed for her clients to feel in control and aware of what was happening. "My clients don't have the time to do all the bookkeeping themselves, but they need to be aware of the process. Using a method like Dext, they are aware of the process and touch their receipts more than once. They are engaged in the process."

Debbi was also able to leverage her unique approach to onboarding to ensure she could educate and prepare her clients for successful adoption. Debbi made it her mission to ensure her clients knew what they were doing and weren't just on autopilot.



Impact

For Debbi, Dext provided her with an opportunity to dive deeper into her client's needs. Saving 20-30% time per client per week allows her to step in as an advisor and educator. With the newfound time, she was able to help her clients deep dive into their financials to understand opportunities for improvement. "Consulting and advisory play a big part of my practice, and I continue to see it growing. We aren't just talking about financial development, but we are talking about how we can diagnose what's happening on the operational and organizational sides of their business through their finances."

Debbi was able to implement value-based billing, providing additional value for her clients and allowing her firm to take on more and more clients. With Dext, Debbi is excited for the continued growth of her firm. With the additional time she saved with our platform, she can continue to seek out her preferred clients and help them achieve business success. With her unique approach, she has generated a 70% survival rate for her client's firms, even throughout the pandemic.

With Dext in her tech stack, Debbi is more than ready to tackle anything her clients bring and is prepared to educate and advise when necessary.

**Ready to
redefine
business
advisory?**

Book a consultation
with a member of
our team.

dext.com/get-in-touch