

Dext

Case study

JCCS

How Montana-based firm JCCS accounting makes time for client advisory with Dext

Saving time
with a robust tech stack



With real time information, we know what kind of cash we have on hand. We know what kind of expenses are coming up.”



Erin K. Vukelich
Accounting & Payroll
Professional
JCCS

[JCCS](#), a Montana-based accounting firm that specializes in Client Advisory Services, with a proficient tech stack to support it. Included in their set-up is Dext which streamlines the work of their six offices and numerous clients across the state.



About

JCCS is made up of 130 employees and offers a wide range of services under the umbrella of consultancy accounting. They take a modern and personable approach to both city-dwelling and rural-based clients. Before 2020, JCCS was primarily office-based but adapted to a remote way of working which has proven successful for them.

Each of their six offices covers different services for various industries, from hospitality to construction, JCCS offers versatile and bespoke accounting services based on their clients' needs. To streamline operations, they've implemented technology to suit their client base.

“Our base tech stack for each client is usually Dext, QuickBooks Online, and a cloud-based payroll system. We pull in other apps if we need them. Such as Bill.com for payables or maybe a point of sale system that integrates to QBO. So the additional apps on top of those three creates a more customized solution,” says Erin Vukelich, Accounting and Payroll Professional at JCCS, working out of their Whitefish office.

Erin works primarily within Client Advisory Services with a focus on payroll and tax services – especially on maximizing technology to serve and enhance the processes involved.



Challenge

Before introducing Dext into their stack, the challenge for JCCS was siloed offices and client information. They had no standardized way of collecting and reconciling client data into their systems, resulting in a lack of true insight into their day-to-day operations.

“Some were scanned, emailed, mailed, dropped off, or put in Dropbox for us to then download. It was chaotic, and trying to keep notes on how to do everything was not working. A lot of balls were getting dropped when it came to client services,” explains Erin.

JCCS needed a user-friendly solution for tech-shy clients. A platform that could be utilized to quickly plug client information into their general ledger software, while also providing deeper insights into clients' financial activity.

“If we can connect it to the general ledger system, that's even better, because then you always know where your documentation is,” says Erin.



Solution

Today, not only can Erin and JCCS obtain client data through Dext's mobile and web apps, but they also have access to real-time data which has boosted the value of their client advisory services.

For colleagues and clients, Dext's technology has also created a singular system for productivity across the organization. Dext offers extensive integration capabilities with major accounting software meaning client information is synced into a central, secured location. JCCS can now share client knowledge firm-wide in real-time, no matter where they are working.

For clients, "they can choose how they want to submit the information, they can email in, snap a picture, or connect their Amazon account. They don't have to learn a new multi-step process. They can fit that in wherever it fits, whatever works best for them, but their information is sent to one place regardless."

On the client advisory side of JCCS, the demand for cash flow forecasting has increased due to the current economic climate. The real-time data provided by Dext has quickened JCCS' response time and allowed them to identify the most urgent cases.

"Cash flow forecasting is what we've been working on the most. We can get the information in real-time and push it across so everything is reconciled quickly, it's fantastic. With real time information, we know what kind of cash we have on hand. We know what kind of expenses are coming up," says Erin.

For clients that live in the most remote parts of Montana, helping them grow their business has become a simpler endeavour and even a referral opportunity. When speaking to a prospective client Erin explains the impact technology like Dext has had on connecting their firm to the heartbeat of their small business clients.

"We set up a double approval process with Dext and Bill.com so they were able to view information at their leisure and we could still make sure everything was paid on time. That made a huge difference in their lives because they could travel and they didn't have to worry. Now they're looking to potentially sell the business. Because we've been getting the information fast, we can turn around those financials to potential people that want to expedite a sale. So not only has it helped the client realise their goals, but it's let us build more referrals, these possibilities were necessarily thought about before technology like Dext," says Erin.



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Impact

- With quicker access to actionable data, JCCS Accounting has been able to expand their advisory services and help more clients achieve their goals.
- JCCS Were able to set up double-approval processes through Dext's integration with Bill.com and QuickBooks.
- Saved a client money through using Dext. They gained visibility over their expenses on suppliers like Amazon.
- Help clients grow and expand their businesses faster, while streamlining processes throughout their organization.

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