For accounting firms, managing many clients on multiple versions of their accounting software poses a real challenge — how do you store and quickly access information about which version the client uses to provide the best possible service? Spreadsheets weren’t doing the job for Presti & Naegele, so the firm built a customer relationship management (CRM) app on Intuit QuickBase that ensures accurate information and results in 30 to 40 new clients per year.

“QuickBase gives us total flexibility in what we do, how we do it and what we see. We’re not stuck in a rigid system – it’s open to however we need to see the data.”

Joe Romano, Partner
Presti & Naegele
For 30 years, Presti & Naegele has been providing accounting services to its clients, a mix of 4,000 individuals and businesses from different industries. The company’s 360-degree service offering includes accounting, bookkeeping and consulting – the cornerstone of the firm’s rise to one of the largest QuickBooks Pro Advisors.

Yet with their comprehensive service offerings came a unique challenge. Almost 95% of Presti & Naegele clients use QuickBooks to manage their financial data, but they could be on any version of the software — including versions no longer supported by Intuit.

This information is key to how Presti & Naegele manage relationships, so the firm needed a way to manage and track the accounting services they were providing, plus keep records of which version of QuickBooks each client was using, when that version was due to be retired and when upgrades would be needed. Spreadsheets did not offer enough power to do what they needed.

“With a spreadsheet, it’s not easy to manipulate data and share it the way we want to,” says Joseph Romano, Partner, Presti & Naegele.

The company decided to use Intuit QuickBase to build a customer relationship management (CRM) app to replace spreadsheets to store, manage and optimize customer data. Romano was familiar with QuickBase (Intuit uses QuickBase to manage several processes for its community of QuickBooks ProAdvisors), and saw it as a good solution to its CRM challenge.

The CRM app houses customer interaction data, including contact information, dates of services and notes about each service. Staff members log in to the app from any computer or device.

Client account information, including sensitive account login and password data, are stored securely within the app. Access to data is governed by QuickBase’s built-in permissions structure to ensure compliance with privacy and secure data-handling laws.
“We have everything locked down so not everybody can get into every single database or every single client account,” explains Romano.

To keep clients updated on QuickBooks, the CRM app also stores relevant version information. From there, it’s easy to run reports that show which clients are in need of a QuickBooks upgrade. The app even generates automatic notifications to alert customers when they are due for an upgrade.

Clients who don’t upgrade receive an email when their version of QuickBooks is no longer being supported. This gives Presti & Naegele an opportunity to identify clients who could benefit from upgrading to another QuickBooks version, like QuickBooks Pro, QuickBooks Premier or QuickBooks Enterprise.

In fact, having nearly every pertinent aspect of a client’s account in one simple app give Presti & Naegele a robust reporting tool for identifying new opportunities.

“Being able to extrapolate our client data in one neat format makes it easy for us to see how many sales tax or payroll clients we have and how many people we have on QuickBooks 2011 – and all of that is easily tracked now within QuickBase,” says Romano.

Profits and Productivity on the Rise
Since it began using QuickBase, Presti & Naegele has seen gains in productivity and profits. The firm is working more efficiently and getting more business value out of its customer data.

Centralizing their data online keeps all their customer data easily accessible in one location so employees don’t have to spend time searching for the information.

“Being with a client or at home and being able to log into QuickBase and get the information we need to help them is a big advantage,” explains Romano.

Upgrading clients to updated versions of QuickBooks takes less time now that the QuickBase automation makes it easy to see which clients need upgrading and automates the task of communicating the information. Romano estimates that putting customer data into action has resulted in 30 to 40 new clients each year, as consulting jobs (the firm spends about 10% of its time consulting companies on QuickBooks) lead to more accounting work.

“QuickBase gives us total flexibility in what we do, how we do it and what we see. We’re not stuck in a rigid system – it’s open to however we need to see the data,” says Romano.