



# Practice Management

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Shaun Powell, GBQ's Director of Finance



An in-depth Case Study



## The roll out of Star Scheduling has also been a huge benefit. Star's Budgeting and Scheduling modules allow us to view budgets versus actuals and see exactly what jobs people are working on which is really useful for budgeting and capacity management.

A top tax, accounting and consulting firm for more than 65 years, GBQ was founded by Morris W. Groner, who opened his first office in Columbus, Ohio in 1953.

The company has expanded to become one of the top 125 CPA firms in the United States. Consistently named one of the 'best places to work' in Central Ohio, GBQ now reports revenue of over \$32 million. Retaining its independence, the company is a member of the BDO Alliance USA, the nationwide association of independently owned local and regional accounting, consulting and service firms.

Until only a few years ago, GBQ's business was run almost exclusively out of one central office in Columbus. However, in recent years this changed with acquisitions that have allowed GBQ to expand into new territories including Indianapolis, New York and Philadelphia.

While this growth brought many exciting new opportunities to the company, it was not without its challenges. Shaun Powell, GBQ's Director of Finance explains: "Previously, we only had to evaluate our profitability in one office. When we started to invest in other offices, we really needed to understand the business we were taking on. Our old system simply couldn't give us the financial data we needed. It didn't have the capability for segregating metrics or reporting which meant that we were constantly chasing numbers."

At the beginning of 2016, the company's investment in Ernst & Rabe, a 20-person office in Cincinnati, meant that it became imperative to start more accurately to evaluate profitability in order to qualify the return on investment.

Shaun continues: "When we acquired our Cincinnati office, we knew we had to strengthen our systems and processes

and therefore needed to overhaul our platforms internally. Compensation based on performance regarding the acquisition also meant it was critical to get our figures right.

"We decided to take the opportunity to review all of the technologies that supported the business. This meant not just our practice management software but also our marketing databases and a change in our document management solution to Microsoft SharePoint. We realized we needed to update these different parts of our infrastructure if we were going to take the business to the next level of growth. We knew if we had any sustainable growth our current infrastructure wouldn't have been able to handle it and we would have had massive growing pains."

GBQ's senior management team had already started to ask what practice management software was available that could provide the robust reporting that

the company required and would also be able to integrate with other systems. Following research and evaluation of the different software packages available on the market, Star was one of three solutions shortlisted.

During the next stage of the selection process, Shaun and GBQ's IT director visited two other CPA firms with offices in Ohio who were already using Star: Hill Barth & King and Skoda Minotti. Shaun comments: "Visiting existing users turned out to be incredibly beneficial. It gave us a chance to look at the technology upfront, see it in action and get a picture of how others were using it. What we found was that we really liked what the Star users were doing. For instance, we saw how Star Scheduling was being utilized and how it was possible to mine vast amounts of data out of the software which is exactly what we wanted to do."

In April 2016, Star was invited on site to demonstrate their product. The contract was signed two months later and the decision was made to convert within five months. Shaun explains: "We knew that we had decided on an incredibly tight timeframe but needed to do it before the busiest part of our year as we felt the only other option would be to delay the whole project. It meant we had to make the sacrifice of running only two rather than three tests which was a concern, but we had confidence in both

our team and Star's team and so decided to go for it."

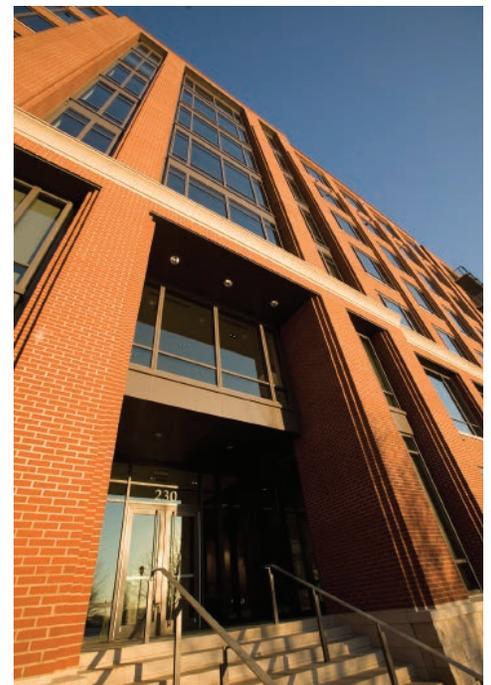
The Star Practice Management software was rolled out across GBQ on a phased basis, starting with Star Time & Billing integrated with Microsoft Dynamics NAV GL and AP and followed in 2018 with Star Scheduling.

Shaun appointed a controller, a former audit manager, to focus on the training and processes and assist with the documentation, allowing him to focus on the data conversion to the general ledger. Shaun continues: "I knew that for this project to be a success that we would need to put a lot of resources on to it, but what was key was the fact that we worked really well with the Star team. Star showed a real willingness to work with us to not only meet our deadlines but to give us the solution we wanted, working closely with us in developing a variety of customized reports. We still ask Star to produce new and different reports as and when we need them, and they always work with us to make sure we have the information we need at our fingertips.

"We were nervous of the condensed timeframe and missing our early November conversion date but we went live only one day later than scheduled and on budget, allowing us to close year end without a problem," says Shaun. "Central to the success of



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the implementation was the fact that we had built an amazing relationship with the team at Star. Whenever we had any questions, we reached out to them and they always provided us with a prompt response.”

Commenting on the benefits that GBQ has realized since implementation, Shaun continues: “One of the features that sold us on Star was the various ways it could take raw data and transform it into easy to understand reports. The Star Practice Dashboard presents information in a way that is highly intuitive and helpful. Previously, we had no reporting for our different lines of business. If our marketing department, for example, asked for a list of manufacturing clients who received auditing services, we couldn’t give it to them. Or if we wanted to compare the performance of the tax departments in Cincinnati and Columbus, we just couldn’t. Now, it’s so easy to pull all this information out and look at all the different parts of our business.

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Shaun adds that the benefits of Star Practice Management are felt across the whole organization: “People always resist change but we saw very little resistance. Users adapted quickly and could see the benefits. Processes became so much easier. Everyone has the mobile app so recording time is quick and easy, no matter where you are. Star’s automated expenses also mean that people no longer have to print up their own expenses, staple receipts or hand deliver for approval. We use a phone app to submit expenses now so a quick photo of a bill taken on a mobile phone can be sent straight for approval and payment. Administrative time is not only dramatically reduced but it simply makes life much easier for everyone.

“Star has been extremely beneficial from an efficiency standpoint. We always closed our books in 4-5 business days. We’ve probably extended this by one day to account for all the reporting we now provide but members are more than happy with that.”

Shaun is clear that the story doesn’t end there and already sees the next step to getting even more out of Star by introducing advanced financial reporting and reaping even greater business intelligence. Shaun explains:

“Star is continually looking at ways to enhance its product by modifying and improving the software which means you feel confident that you have a solution that is fit for the future. GBQ is about to be one of the first Star users to use the Opportunity Tracking module to enable new opportunities to be entered directly into the system and for clients to be set up automatically. This is going to give GBQ the ability to track new client projects with up-to-date pipeline reporting, which would never have been possible with our old systems.

“Star has given me the transparency and the knowledge that I didn’t have before and really helps in making critical business decisions. I’m now able to see the cause and effect of the business and we’re no longer making decisions based on guesswork. With Star, we can evaluate investments we’ve made and the data pinpoints exactly how we’re doing, showing us if and where we need to employ additional resources or change direction. Star is now integral in supporting our future growth, providing us with a new level of understanding in terms of the performance and profitability of our business.”

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