STAR
The Professionals' Choice

Practice Management
innovative • functionally rich • technically advanced

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MIZE HOUSER & COMPANY P.A.

An in-depth Case Study

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Most Certified Public Accountants these days have expertise in information technology but few can match the breadth and depth of experience – and abilities – of Mize Houser & Company P.A. The firm became involved in IT back in the early 1960s, when it was handling accounting for a number of large clients who were very early adopters of technology. This was long before the personal computer was invented and at the time when the internet was little more than an academic exercise. By the mid-1980s, alongside its flourishing CPA practice Mize Houser had built a significant IT business, providing services to clients as well as writing its own software to help manage its operations.

This led to the creation of the CPA/MIS® practice management system which went live in-house in 1985 and following its adoption by accounting firm Rehmann in 1987, went on to be installed in 25 more CPA firms across North America. "Mize Houser has always been more technologically advanced than a typical CPA firm. Our IT team is

exceptional and getting better all the time," says Shareholder, Keith Olson. "We were ahead of the curve when we developed the system for Mize Houser and built on this to expand the functionality into a powerful management information system. Other CPAs found out what we were doing and asked if we would license the system to them, so we were in the fortunate position that clients for CPA/MIS came to us. We really didn't need to go to market in the traditional way."

The impact of CPA/MIS was significant, giving CPAs an effective means of automating much of their accounting and administrative processes. The system had proven its worth at Mize Houser, which had around 160 people in practice across three offices in the Midwest and could scale easily – so it was suited to CPAs of various sizes.

But technology never stands still. Over the years, Microsoft Windows came to dominate the desktop, and Mize Houser's client base began to ask whether there were plans to migrate

CPA/MIS from a character-based system to a Windows version.

"The cost of redeveloping CPA/MIS from its legacy platform to Windows would have been well in excess of what we would ever earn in return," says Bill Pressler, Software Developer, for Mize Houser. "We have always had an excellent relationship with our users and we were working together to find a product to replace CPA/MIS. We quickly found that there were few suppliers in the US who had a viable solution for medium and larger CPA firms, so we expanded our search. One of the alternatives we looked at was the Star Practice Management system – and it soon became the product of choice."

"During 2008 we decided to approach Star's office in the UK but coincidentally Bernard Skalla, CEO of Star Americas, contacted Mize Houser on recommendation from Clifton Gunderson, a Top-50 US CPA firm which had already installed Star Practice Management," adds Keith Olson. "We started negotiations in

early 2009 and the deal was done by the end of April."

In essence, Star Americas and Mize Houser & Company P.A. joined forces to market the Star Practice Management system to accounting firms across the Americas, covering the United States, Canada, Central America, South America and the Caribbean.

A key early focus for the partnership is on transition of the CPA/MIS customer base to Star Practice Management and the two companies are working closely together to achieve this.

"The partnership is probably stronger than most," adds Bernard Skalla, "in that we forged our relationship through the process of implementing Star Practice Management at Mize Houser. It not only confirmed that we had made the right decision to get together but also proved beneficial for future users from the system enhancements we made – and will continue to make – to further enhance the system functionality. The enhancements that were deployed for Mize Houser have now been made available to other users."

Bill Pressler comments that there was no doubt that Star Practice Management was an excellent package and the core functionality was exceptional. Billing, Work In Progress analysis, time and expense entry, job management, staff scheduling, staff budgeting and

accounts receivable management are all covered but Mize Houser needed a number of modifications and additions.

For example, the firm needed an interface from its HR program to push employee updates and audit trail data from its iSeries application through to Star, using database triggers. Similarly Mize Houser wanted to push client changes from Star over to its CPA/MIS database for due date tracking and its internal document management system. Interfaces for payroll and expense imports – such as FedEx and computer charges and firm expenses – were also developed.

The firm did a lot of work customizing the General Ledger interface so the Mize Houser financial statements would be much easier to generate - this is particularly valuable as previously much of this had been done manually. WIP and Accounts Receivable reconciliations, together with production by department, billing adjustment allocation, expense analysis, and billing entries, have all resulted in the faster delivery of more accurate, concise and informative financial statements.

Over the years Mize Houser has become very adept at system development and installation, handling the IT aspects and conversions of as many as 20 to 25 mergers a year for its clients. Bill Pressler and his team applied the same exacting standards

Linda Hauschild
Shareholder

Keith Olsen
Shareholder

and best practices to his own firm's migration to Star. Advance preparation and attention to detail, together with effective implementation team training by Star paid off with a seamless transfer from CPA/MIS to Star over a remarkably short three-month period. Since then, Star has been a hit with everyone at Mize Houser, whether shareholders, managers or staff.

Linda Hauschild, Shareholder at Mize Houser, says "Star Practice Management is the fourth time and billing system I have used and is, by far, the best. I have found it to be user friendly, intuitive and easy to use.

Converting to Star has allowed us to implement more efficient timekeeping, billing and reporting processes. I am especially impressed with the Dashboard feature. It presents the specific data I want to see right on my desktop, complete with drill-downs to the level of detail I want to view. I can see aged WIP, receivables, billing realization, staff production, staff budgets, billing alerts, draft invoices and so on, at a glance, whereas before I had

to run a report – or have someone run it for me – in order to view this data.

The Billing Alert feature built into my Dashboard has been a huge help to me. Every day I receive an updated list of my clients that are ready to be billed. And the billing process is so quick. I can do my billing from start to finish completely online – no paper until the final invoice is printed. Drill-downs to the underlying data, such as WIP details and descriptions, as well as copies of previous invoices, puts everything I need at my fingertips. The time I spend with billing has been cut in half."

Ashley Barmann, Executive Assistant at Mize Houser, is equally enthusiastic: "The transition from CPA/MIS to Star was painless from an end user's perspective. Star is very intuitive and easy to use for people of all computer skill levels. One of my favorite features is the ability to drag and drop from history and favorites in the timesheet, as it is a huge time saver. Also, the ability to pull information out of Star is as easy as clicking on the Excel button and saving the file to your computer.

Star has also made the grids – billing, accounts receivables, WIP, timesheet and so on – very much like Excel, which gives the user the ability to sort ascending versus descending by clicking on the column headers, options to filter information, and arrange screens based on their viewing preference."

Having worked through a very successful migration from CPA/MIS to Star Practice Management on its home ground, Mize Houser is set to apply its hands-on expertise to benefit other firms. Top 50 US accounting firm, Rehmann, with more than 650 professionals in 16 locations throughout Michigan, Florida and Ohio, has already gone live and Mize Houser is in discussion with other members of the CPA/MIS client base and will be with fellow members of BKR International. These and other medium to larger firms are ideal candidates for the robust tracking and reporting capabilities of Star and Mize Houser's experience will be invaluable for a smooth transition.