



# Practice Management

innovative • functionally rich • technically advanced

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Joan Payne, CFO, Rehmann



CPAs • Business Consultants • Financial Advisors

An in-depth Case Study



## The feeling is that no matter how much new business Rehmann takes on, or how many new firms become part of the expanding operation, the Star Practice Management system is pretty well future-proof.

The evolution of Rehmann into one of the largest CPA, wealth management and corporate investigative services firms in the Midwest of America has been remarkable – and it shows little sign of slowing down. Back in 1941, it was a single Saginaw-based accounting practice. Through a series of strategic mergers and acquisitions, Rehmann now ranks as the 36th largest US accounting firms and has more than 600 professionals in 16 locations throughout Michigan, Florida and Ohio. Rehmann is also a member of Nexia International.

Joan Payne, CFO for Rehmann, explained: “Our wealth management division has expanded tremendously and Rehmann Corporate Investigative Services (RCIS) doubled in size as of July 1st following the acquisition of Veritas Global LLC. There has also been a steady stream of mergers with one or two CPA firms a year, but, more recently, we have been completing one or two a quarter in financial services and wealth

management as we continue to grow these business areas.”

Operating under a common corporate umbrella and identity, Rehmann is leading the charge of a new breed of accounting firms – committed to keeping ahead by constantly adapting and offering clients a greater scope of resources and expertise to meet business demands.

This also means keeping ahead in the way in which Rehmann’s principals and associates manage the firm to ensure they fulfil their promise of ‘delivering business wisdom.’ They stress that this doesn’t mean they think they know it all, rather that they know how to listen, research, collaborate, learn from experience and innovate to come up with comprehensive solutions to complex problems. Rehmann’s staff works closely with their clients to create new ways of helping people achieve their unique goals.

It is an approach that proved its worth when the firm decided it needed to

significantly improve its IT infrastructure, replacing its ageing practice management system. “The firms with whom we were merging as recently as 2008 couldn’t believe we were still running on a character-based practice management system! We were on one of the first CPA/MIS® practice management system installations by Mize, Houser & Co, it was over 20 years old and clunky to use. It was difficult to retrieve information without the help of an IT programmer to run reports and took ages to customise, upgrade and test,” Joan said.

“We knew from our experience with the firms that were becoming part of Rehmann and taking account of our growth plans that we needed a dramatic improvement in our practice management software. But we also appreciated that the replacement would play an important role in the continued success of the firm, and we were prepared to spend time on finding the right solution.”

Rehmann had built a very good relationship with Mize, Houser and the inclination was to stay with the company while it redeveloped the system, but there was some uncertainty over the timing of the project. This prompted Joan and her IT colleagues to look seriously at alternatives. As well as practice management software from Star Americas, these included systems developed for other markets, such as legal or more general professional services that fell short of the functionality needed by CPAs. They had already met Bernard Skalla, CEO of Star, and seen an informal demonstration of the software following news of the deployment of the Star system at Virchow Krause, now Baker Tilly. Coincidentally, Mize, Houser was also in discussion at that time with Star about the possibilities of transitioning CPA/MIS users onto the Star platform.

“Of all the software we considered, we were happiest with Star,” Joan recalls, “not only in functionality but in terms of pricing and licensing. It was also apparent that compared to other vendors, Star’s people knew the most about the accounting profession. Any questions we asked relating to how something was billed; how hours were charged; how to deal with inter-office calculations – they had either seen it before, knew how to do it or had a number of recommendations.

That went a long way for us. We felt very comfortable with Star’s knowledge and depth of experience.

“We knew we would be putting on a lot of growth, especially in wealth management in the next couple of years, so the new system had to be able to cater for the different business entities operating under the Rehmann umbrella. We wanted to integrate data and revenue sources to give a single view of each client, bringing together total revenue and profitability in one place, regardless of whatever service we were delivering. Star was the only vendor that said it would even tackle this for us. The solution proposed was for Star Practice Management, integrated with Microsoft Dynamics NAV general ledger with separate companies as well as extensive intercompany functionality provided for. Accounts and receivables for three entities were set up for the CPA, wealth management and corporate investigative services businesses which Star also specified, supplied and implemented.”

The integrated solution also addressed the need for robust security and accounting functionality within the individual entities, including enforcing ‘Chinese walls’ and restricting access, for example, by CPA associates to client investment details held within the wealth management operation.



Rehmann signed the contract with Star Americas in June 2009, following which the firm's associates worked closely with Star's implementation team throughout the summer months to ensure a faultless transition from the CPA/MIS system to Star Practice Management. This involved three data conversions – one for each entity – and resolving issues as they became apparent, at the same time as the firm's associates were doing their regular job, as well as bringing the new mergers and acquisitions onboard.

"Star's consultants were phenomenal," Joan adds. "They kept the same long hours as we did and were absolutely dedicated to ensuring the success of the project.

The key was tremendous depth of detail in the project planning so we were well prepared ahead of time. We turned the existing system off on October 31, completed the data transfer that week and all our associates began entering time and expenses from

9 November. The emphasis is on ease of use, whether our people are at their office locations or working offsite.

The Star Practice Management software sits on our central SQL servers, and is accessed through associates' laptops, connecting when they are offsite through a virtual private network (VPN) or alternatively, they can work offline and the system synchronizes automatically when they next go online."

Joan comments that one of the great benefits is that associates can now get invoices out to clients very quickly rather than waiting for weekly and monthly production runs. Delays of a month or more before billing are no longer the norm. Now, automatic overnight approval of time and expenses means clients can be billed the next day – or associates can even approve entries as they enter their T&E, pressing the approval button as they work through the on-screen form line-by-line. It is not uncommon for work

completed in the morning to be billed to the client that afternoon.

"Some of our clients really love it. Because they receive bills faster, there is less of a gap between when the work was done on their behalf so they have a better understanding and appreciation of what they are paying for. And our associates love that they can pull out a huge variety of management, financial and client reports. It is now much quicker to migrate newly merged or acquired firms, plus training is a whole lot easier," Joan concludes.

The feeling is that no matter how much new business Rehmann takes on, or how many new firms become part of the expanding operation, the Star Practice Management system is pretty well future-proof. System reliability and availability is excellent while Star's post-implementation team can dial-in remotely to provide direct support and maintenance, virtually on demand.

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**STAR**  
The Professionals' Choice

**UK**  
**Star Professional Software Solutions Limited**  
Star Centre  
Building 3 Hatters Lane  
Croxley Green Business Park  
Watford WD18 8YG  
Tel: +44 (0) 1923 246414  
[pminfo@starplc.com](mailto:pminfo@starplc.com)

**IRELAND**  
**Star Professional Software Solutions Limited**  
Carmichael House  
60 Lower Baggot Street  
Dublin 2  
Republic of Ireland  
Tel: +353 (1) 661 3030  
[pminfo@starplc.com](mailto:pminfo@starplc.com)

**USA**  
**Star Americas Software Solutions LLC**  
O'Hare Triangle Plaza  
8770 W Bryn Mawr  
Suite 1300  
Chicago, IL 60631  
Tel: +1 (773) 867 8343  
[pminfo@starplc.com](mailto:pminfo@starplc.com)