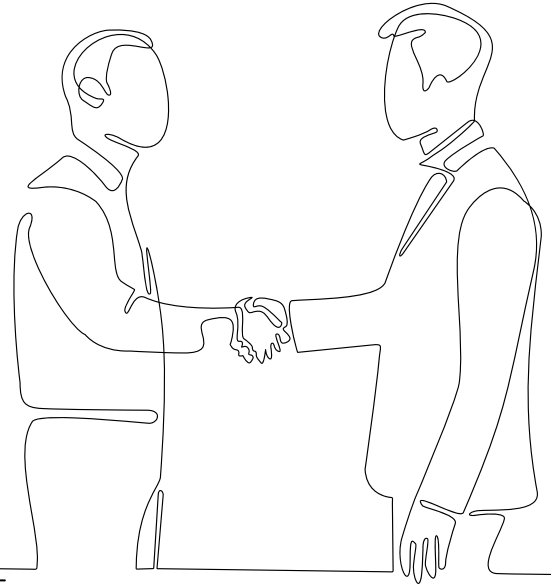


Elevating Success: California-Based Accounting Practice's Journey with NextGen

NextGen's back-office support transformed the journey of this California-based practice, enabling them to overcome the challenges of hiring and retaining a reliable bookkeeper.



INTRODUCTION

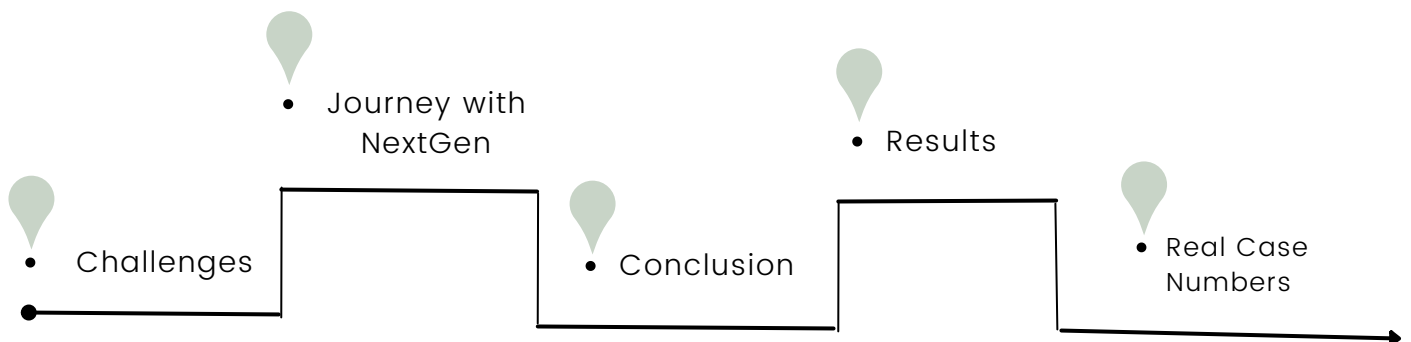
Nestled in sunny California, a thriving accounting and bookkeeping practice is run by our client.

A CPA with decades of experience. In this story, the role takes his wife and partner with 3 years of bookkeeping experience and a dedicated 27-year-old bookkeeper handling administrative tasks.

Despite their unique combination of skills, the team faced significant challenges in finding and retaining a reliable bookkeeper.

That's when they discovered NextGen, which provided tailored back-office support services to help them overcome these obstacles.

EXPERIENCE MAP

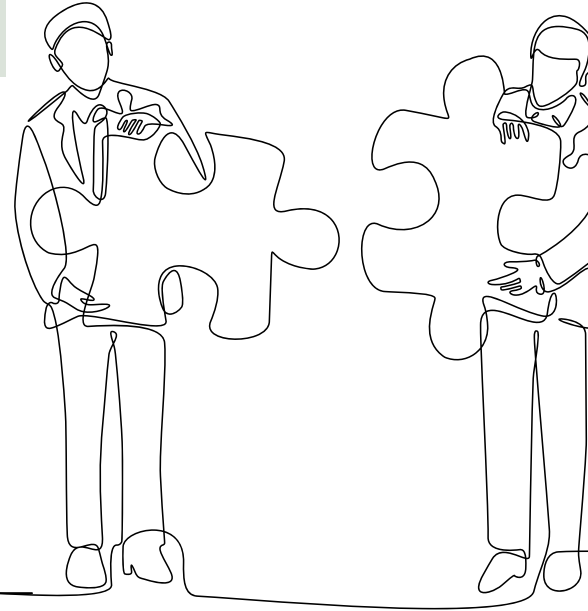


CHALLENGES

Their practice struggled to find a skilled and devoted bookkeeper to handle their increasing workload.

As a result, they were unable to focus on their core accounting services and client relationships.

The team was overwhelmed, and their growth potential was stifled.



JOURNEY WITH NEXTGEN

After hearing about outsourcing and searching online for solutions, our clients came across NextGen's website and started exploring their services.



Intrigued by the potential benefits, they reached out and **scheduled a 30-minute introductory** call with NextGen to assess their infrastructure and setup.



Following the call, both parties agreed to a **2-week (RISK-FREE) trial period**, allowing both partners and our clients to evaluate NextGen's expertise, processes, and communication before fully committing.



Once the trial period concluded, **NextGen designed a comprehensive workpaper for each client**, implemented a detailed delegation, review, and communication process, and provided access to additional team members as needed.

QUOTE FROM OUR CLIENT:

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"We knew we had the expertise to grow our practice, but finding a reliable bookkeeper was a constant challenge.

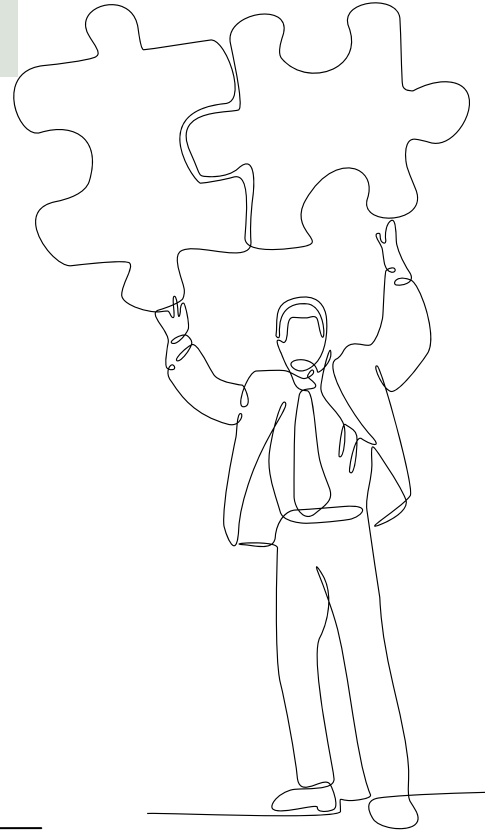
We needed a solution that would allow us to focus on our clients and expand our services."

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THE RESULTS

NextGen's back-office support services brought measurable and significant improvements to this California-based practice:

- **Time savings:** NextGen's reliable bookkeeping services freed up the team's time, enabling them to focus on their core accounting services and client relationships.
- **Enhanced client satisfaction:** With NextGen's support, the practice was able to offer more personalized and tailored services, leading to happier and more loyal clients.
- **Growth:** NextGen's services allowed the practice to onboard new clients, increasing its revenue and expanding their reach.



REAL CASE NUMBERS

Before partnering with
NextGen:

- Total clients: 50
- Revenue per client: \$600
- Total revenue per month: \$30,000

After engaging NextGen's
back-office support:

- Total clients: 80
- Revenue per client: \$750
- Total revenue per month: \$60,000

QUOTE FROM OUR CLIENT:

“

"Partnering with NextGen has been a game-changer for our practice.

They have taken the burden of bookkeeping off our shoulders and allowed us to grow in ways we never thought possible."

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