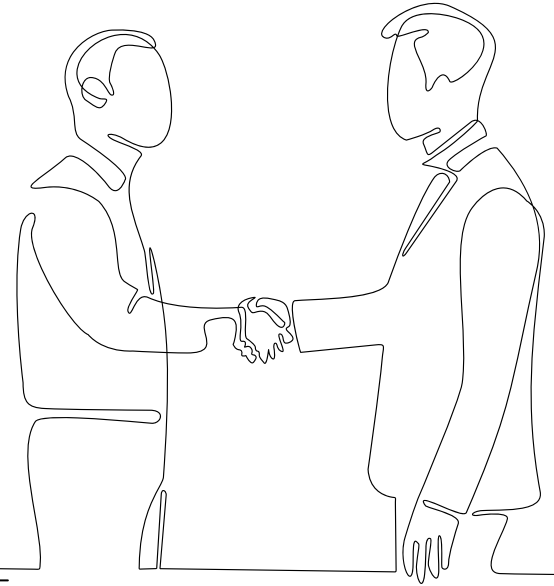


Embracing the Future: Accounting Practice Reinvents Itself with NextGen's Support

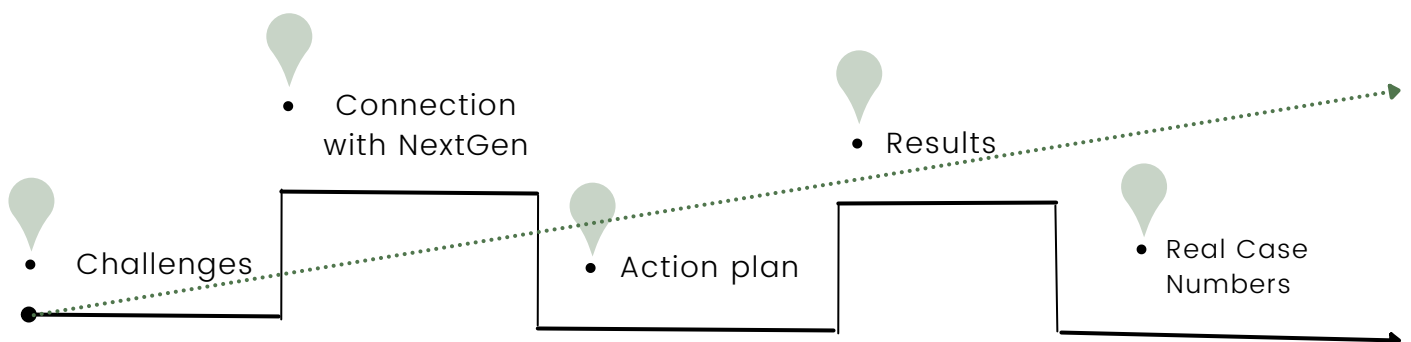


INTRODUCTION

Our client's accounting practice has long been a trusted name in their community. Boasting a loyal clientele who appreciate the personalized services provided by the team of four dedicated bookkeepers and the practice owner.

However, as the industry evolves and client expectations shift towards more technologically advanced solutions, our client realized the need to modernize her practice to stay competitive and continue delivering top-notch services.

EXPERIENCE MAP



CHALLENGES

This practice faced several hurdles in their journey towards modernization:

Adapting to new technology:

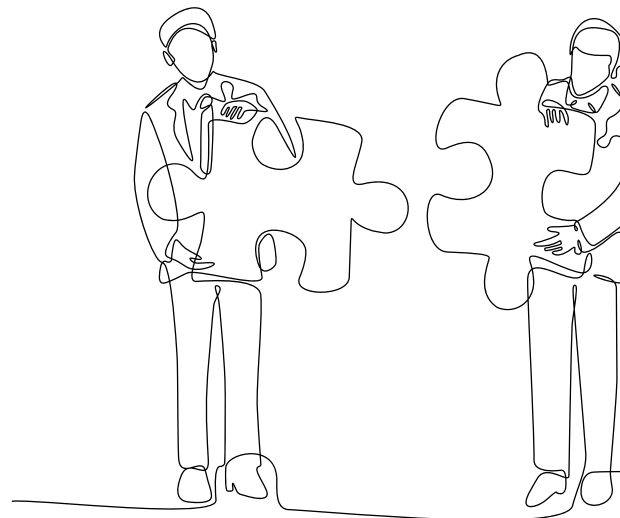
Integrating advanced software and tools into their workflow proved to be challenging for this practice, who were more familiar with traditional methods.

Training the team:

Ensuring that the bookkeepers were well-versed in new technologies and techniques required significant investment in time and resources.

Balancing modernization with personalized service:

Our client was keen to maintain her practice's reputation for offering personalized services while also embracing digital transformation.



DISCOVERING NEXTGEN: A TIMELY SOLUTION

After conducting thorough research on potential partners to aid in modernization, the practice owner discovered NextGen. Our extensive experience in implementing cutting-edge bookkeeping solutions, coupled with a deep understanding of traditional accounting practices, made us the perfect fit with our client's practice.

The client decided to schedule an introductory call with our team to explore the services further.

THE ONBOARDING PROCESS: A SEAMLESS TRANSITION

We began by conducting a comprehensive assessment of the practice, identifying areas in need of modernization and recommending tailored solutions. Our senior assisted the practice's team in adopting new software and tools, ensuring a smooth transition with minimal disruption to ongoing operations.

Moreover, NextGen's white-label approach enabled this practice to maintain its personalized touch while benefiting from the latest technology.

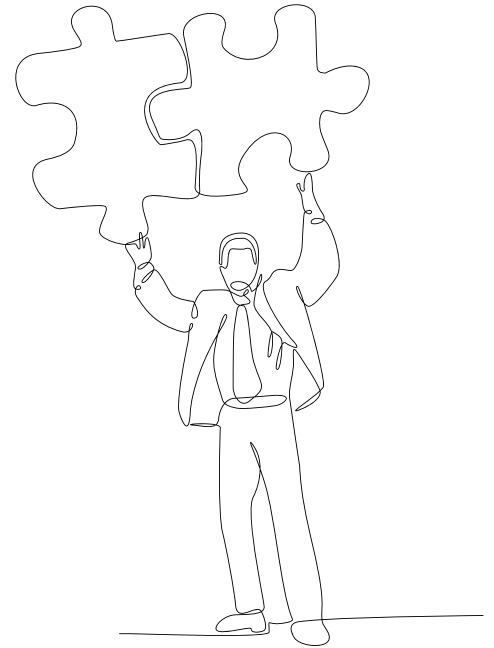
THE IMPACT: A MODERNIZED PRACTICE READY FOR THE FUTURE

With NextGen's support, our clients accounting practice successfully transitioned into the digital era, boasting several notable achievements:

Improved efficiency: The introduction of advanced tools and software streamlined the practice's operations, significantly reducing manual tasks and freeing up time for value-added services.

Enhanced skills: The team of bookkeepers received training in new technologies, enabling them to offer a broader range of services to their clients.

Client satisfaction: By blending modern solutions with their personalized approach, our client's practice managed to enhance client satisfaction while attracting new clientele looking for technologically advanced services.



REAL-CASE NUMBERS: MEASURABLE IMPACT

Before partnering with
NextGen:

- Monthly revenue: \$50,000
- Clients per bookkeeper: 15
- Services offered: Traditional bookkeeping and tax services

After engaging NextGen's
back-office support:

- **Monthly revenue: \$80,000 (60% increase)**
- **Clients per bookkeeper: 22 (47% increase)**
- **Services offered: Expanded to include advisory services, real-time financial analysis, and cloud-based bookkeeping solutions**

Our client's accounting practice embraced change, partnered with NextGen, and achieved modernization. Their personalized approach and innovative solutions led to long-term success in a competitive market, inspiring other traditional practices to thrive in the evolving landscape.