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owner of BMRG admits that there was a harsh learning curve to get her firm where it is today. And where is that exactly? The bright lights of Supa-Successville! Katrulya, like many firm owners, did her time in the world of public accounting and corporate offices. "I left my last firm in 2004 to start my own practice," she recalled.

Kristy Short • Jun. 24, 2011

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corporate offices. “I left my last firm in 2004 to start my own practice,” she recalled. “Thankful for the generous support I received from the firm I was leaving, I set up shop in my two-bedroom condo, using my home LAN line and a lot of long extension cords.”

Starting out as a QuickBooks firm, Katrulya offered remote bookkeeping services to small business clients.

“Our main focus was general bookkeeping and maintenance of clients’ QuickBooks files,” Katrulya stated. “We eventually moved from supporting clients via a terminal server to a hosted version of the software. It was more efficient, but we were still essentially a bookkeeping-only firm.”

‘Finding their legs’ was how Jennifer Katrulya described the years of trial and error while she grew her firm. From installing a sufficient phone system to building staff and a proper technology infrastructure, she admits that at times it was painful.

“We had to get the technology right first. From there we could define our service offerings and start to standardize our pricing,” Katrulya said.

The first few years were dedicated to searching for the right technologies and testing key solutions within her firm. Some applications worked, while others failed miserably. In the end, Katrulya found the right mix of technologies that could not only support internal processes, but also provided a turnkey solution to support a defined client niche.

“We had to get it right. Our ability to transition from a bookkeeping firm to one that offers advanced outsourced accounting and advisory services depended on it,” stated Katrulya.

A New Breed of Outsourced Accounting Service Defines

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Our client base is comprised of businesses that range from \$1 million to \$50 million in revenue,” Katrulya shared. “All of them are highly mobile businesses that want to be even more mobile. What this means is that they are looking to outsource activity that is traditionally facilitated on premise.”

With an advanced platform in place, BMRG is well positioned to serve this premium niche.

“Our client solution is turnkey,” Katrulya explained. “Once implemented, clients are up and running in a matter of hours because the technology is incredibly intuitive. There is virtually no learning curve. And because it’s SaaS-based, clients can remain mobile.”

With clients in 13 countries and in multiple U.S. states, BMRG also had to be thoughtful of vast differences in time zones. The 24/7 access offered by a true SaaS system allows the firm to operate round the clock and provides clients with up-to-the-minute data no matter where the client is located.

Outsourced accounting is certainly not a new idea. However, where BMRG differentiates itself from its peer firms is in the technology. Running on an end-to-end hosted and SaaS-based platform allows Katrulya and staff to provide outsourced accounting that is two-way, on-demand and scalable.

For most practitioners, “outsourced accounting” is handled within the walls of the firm, and information is pushed out to clients on a scheduled basis. BMRG opens the back door to its accounting solution, enabling clients to access and view their data whenever needed and pull financials and reports on-the-fly.

“We service very large clients who can’t wait for end-of-month to receive reports and financial statements. They need access to data on-demand, and that is what our solution offers,” said Katrulya. “These clients have to feel that we are a part of their

business and working on their schedule ... that we are their personal accounting

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'seats' per application without having to deal with licensing hassles," Katrulya explained. "SaaS makes it simple all the way around."

Navigating the Not-So-Confusing SaaS Waters

Katrulya admits to struggles with technology up front. But once past the testing phase, the productivity gains experienced made it well worth the effort. Not only did she have her firm running at peak efficiency, she was also able to develop a turnkey outsourced client accounting system comprised of the same powerful technologies.

"It was a linear process, albeit a long one," Katrulya stated. "We started by identifying the right technologies to create our internal system. From there, we were able to define our client services and adopt a standardized pricing model."

Katrulya makes a point to mention that SaaS applications and services, while they may still be a "new" concept to some firms, offer some of the most intuitive and powerful innovations available to the profession. She encourages practitioners to get their feet a little wet and try out a few of these technologies.

"SaaS is not that confusing. The technology is simple and straightforward, and it seems like most applications seamlessly integrate, making easy work of building your own custom system," Katrulya said.

Jennifer Katrulya is a good example of a small firm owner that has hit the big time. Having defined a lucrative client niche and operating a highly efficient practice, BMRG is the epitome of a Great Practice.

[CALL OUT BOX]

Stats at a Glance

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About the Author

Kristy Short, Ed.D, is partner and Chief Marketing Officer in RootWorks LLC (RootWorks.com) and president of SAS Communications 360 (SAScommunications360.com) — firms dedicated to providing practice management education, branding, marketing and public relations services to the accounting profession. She is also a professor of English and marketing. She can be contacted at Kristy.Short@CPAPracticeAdvisor.com.

Possible Pull Quotes:

“We had to get the technology right first. From there we could define our service offerings and start to standardize our pricing.”

“These clients have to feel that we are a part of their business and working on their schedule ... that we are their personal accounting department. Our advanced solution allows us to become a part of the client's business — without being onsite.”

“SaaS makes it simple all the way around.”

Katrulya makes a point to mention that SaaS applications and services, while they may still be a “new” concept to some firms, offer some of the most intuitive and powerful innovations available to the profession.

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