CPA
Practice Advisor

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Kregel & Company CPA
www.kregel-cpa.com

For Kregel & Company, it's all about the customer...all the time.

Scott Kregel, CPA, MST, and owner of Kregel & Company CPA is a firm believer that

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A few years ago, Kregel noticed that customers were having an issue using the firm's portal solution. He explained that the solution worked fine for his staff, but it caused problems among customers who required a fair amount of training to use the portal platform.

"Customers shouldn't have to spend more than a few minutes uploading and retrieving their documents. But with our old solution, staff had to do a lot of coaching and explaining, and for some customers it was still too cumbersome," said Kregel.

With a customer-first attitude, Kregel set out to identify a new system—one that would support his vision of simplifying customer workflow. After some research, he identified several Cloud-based applications to support a convenient and simple solution. "The solutions we choose support an efficient, paperless workflow across the board, including Thomson Reuter's SaaS-based software and Bill.com. But it was SmartVault that helped to meet my main objective—a highly intuitive document management and portal system that was simple for our customers to use."

Kregel further explained that because his customer base is made up of entrepreneurs and small businesses that run the gamut on tech-savviness, it was critical that he offered a document delivery system that was easy for everyone.

Kregel knows all too well that you can't force all customers into one category. "We have very tech-smart customers and those who struggle. We had to have one system that worked for everyone. We now offer an exceptionally easy to use customer delivery platform thanks to SmartVault. Customers need little to no explanation on how to access their Vaults and upload or exchange documents. It's just so simple for all users—and that includes my staff."

Kregel explained that the firm's original document management system is no longer

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sharing solution included built-in tech support and elevated security. In fact, the firm is 100% cloud-based, supporting a broad system that is made up of best-of-breed applications to deliver great results for customers.

Kregel loves the fact that technical support is not an issue. "Our full solution lives in the Cloud, meaning the folks at SmartVault, Bill.com, and Thomson are on top of enhancements and updates. We have immediate access to new system versions without having to lift a finger. There is no reason for onsite technical staff, and that's a big relief."

Kregel stated that it's nice not dealing with servers, IT personnel, and everything else that goes along with maintaining software onsite.

In relation to security, Kregel is well aware of the issues surrounding sharing customer documents via email, and finds the process of password protecting PDFs a big hassle.

"Email is not the safest way to deliver customer documents, and there's also the issue of version control. With portals, our customers are always accessing current versions, and we know their data is safe," Kregel explained.

Kregel has a number of IT customers who are clearly technology smart and understand the issues with data security. One customer even tested the firm's security measures. "One of our IT customers made it his personal mission to try and hack into a password-protected PDF of a tax return. He broke the code in less than 10 minutes and made sure I knew about it. With SmartVault, we know data is secure in the Cloud and sharing data via Vaults is the safest method. And this particular IT customer is thrilled with the system's strong security features."

Overall, Kregel is very pleased with his document management solution choice. "We started with a focus on enhancing the customer experience…and that's what we were

able to do."

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a birthday message each year either by text, e-mail, or a paper card through the mail.

"It's a small thing, but just remembering their birthday and sending a quick note makes our customers feel special."

Kregel and his staff also throw a Tax Return Signing Party every year for their longest standing customer—complete with streamers, balloons, coffee, and treats. "The customer that's been with us the longest is a multi-state corporation, which traditionally meant a lot of paper being mailed. Now, we bring them in to our office, shower them with attention, and present them with a few e-file documents for signature."

The focus at Kregel & Company CPA is always on the customer. "For us the key is staying true to our 'why' [the firm's mission or *why* they exist]. We are in business to identify opportunities and offer peace of mind and inspiration to our small business and entrepreneur customer base. We first look to understand the customer and then, working in partnership with them, capture and present the financial data that will help them make sound financial decisions. It's a great feeling when our customers remark how working with us is such a positive and different experience."

Back to the Basics

Leading firms like Kregel & Company are applying advanced technologies and tested workflow practices to improve firm operations and customer service. And while these are necessary elements in today's progressive firms, Kregel maintains a focus on the basics.

"Some things don't change, and quality customer service is one of them. The customer experience will always be our main concern," Kregel stated.

While Kregel's firm does stay ahead of change in terms of technology, the focus is and

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- Firm description: Full-service accounting and tax strategy services firm
- Technology of Choice: SmartVault, Google Mail, GruntWorx, UltraTax CS, FileCabinet CS, QuickBooks, Bill.com

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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. Reach her at kristy.short@cpapracticeadvisor.com.

Technology

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