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Thrive: Non-Profit Success Stories from Barnes Dennig #1 | Large Non-Profit Transitioning to a Full-Service Firm

Patrick Frambes & Christa Woelfel

Patrick Frambes:

Well Christa, yeah, as you know we're here to talk through some of our non-profit client success stories. Having one of the largest non-profit practices here in town's, given us a lot of opportunity to work with a number of clients and great people that we work with and be able to share the experiences that we have with them. So I just want to talk through some of our success stores. I know we work a lot together and always appreciate the chance to work with you, with our clients.

Patrick Frambes:

This client had been a serviced by a smaller accounting firm I know for a number of years, and I think had outgrown that organization, that firm. So they're seeking for an opportunity to bring in a firm of our size with our experience and background, to be able to expand on their accounting services, what they're doing internally, business operations.

Patrick Frambes:

But I don't know if you can share maybe talking through some of that first-year transition, which I know had some road bumps, but we were able to get through with them and then success of moving forward this year as well.

Christa Woelfel:

Absolutely. So working with them the first year, like you said, there's some road bumps. During our audits we get a little more in depth than I think some of the smaller firms do. So working through that with them, I think they really appreciated it though. They liked how we worked with them well. We might have asked for more than they were used to, but they were willing to provide it and they were happy with all of our suggestions.

Christa Woelfel:

I think the fact that we do have such a big non-profit base really helps give our clients recommendations going forward. How they can improve some things from an internal control standpoint, from a reporting standpoint. So I think that really helped. They did appreciate all of our help there definitely.

Patrick Frambes:

Absolutely. Yeah. One of the things I know we stress and I think you do a great job of is just communication through that audit process. I know it was the first time where he was working with not just a sole practitioner or a small team, it was working with somebody of your caliber to be able to work through the audit process. Can you share a little bit about how you communicate with your clients? There's the field work and then wrap up can tend to take longer if it's not well communicated.

Christa Woelfel:

Absolutely. So COVID did change things up a little bit for us, but I think now it's been for the better because we're more versatile in the ways that we can communicate with them and continue to do the wrap up process throughout. So I know we met with them to kind of get the planning and let them know how the process is going to flow, how we're going to be getting the request to them and the information from them, which the use of Suralink is very helpful there.

Christa Woelfel:

Then during the audit process, the first year, I believe we did remote because of COVID. The second year we were in person. So in person it's a little bit easier in the beginning just so you can stay with their... Stay on top of things with them. You can talk with them in person, just walk up the flight of stairs, talk through how things are going. But even remotely, we would try to have check-ins with him pretty frequently. So he knew what we needed from him, if he needed anything from us. That was very helpful just to keep in constant communication.

Patrick Frambes:

Yeah. Well, that's great. Can you describe Suralink a little bit and what that is?

Christa Woelfel:

Yes, absolutely. So Suralink is the website we use to process all of our audit or review any compilation request, any engagement we're on really. So we started using that, was it three or four years ago now?

Patrick Frambes:

I think so.

Christa Woelfel:

Yeah. So it breaks everything out by the category, the specific request. Then as we're sending our communication emails to them throughout field work, I like to put what Suralink requests specifically they can upload it to. It just keeps it nice and clean. We know where to look for it. They know where to put it for us. Rather than emails, you can forget to reply all. Some people can have information that others don't have, so Suralink makes it available to the whole team. The good thing is that the client can go back to prior years and see exactly what they provided us and pull that roll forward for the next year.

Patrick Frambes:

Well, great. Yeah. I know this client had definitely appreciated the professionalism that we provided in providing our services and the efficiency I know we saw was night and day from that first year via the gathering information. There was a lot that we needed to learn about them and then we're just able to expand on that, that second year and dive even deeper with them to provide even more feedback and improve their controls.

Christa Woelfel:

Definitely.

Patrick Frambes:

Great.

Christa Woelfel:

It's a great client. So I look forward to working with them in the future.

Patrick Frambes:

Well great.