Thrive: Non-Profit Success Stories | Communications Best Practices| Transcript

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Patrick Frambes:

I had an opportunity to talk with you a few years ago and share some information about our non-profit niche, client interactions, all of those things. And I know we're back together again just to share how things have maybe changed or grown throughout the last few years.

Christa Woelfel:

So, last time we talked, there were a number of new clients we brought on, as you mentioned. And over the past handful of years, we've got to see them really grow, change their operations, maybe make new entities, new programs. We're right there alongside of them, making sure that their processes, their controls are still in place, still effective, and still efficient. As these clients grow, sometimes, they need to change a little bit of their controls or their processes.

For example, maybe they had two check signers on every check before. Maybe they can bump up that threshold to save them some time as they're really growing their operations. So, it's been amazing to see some of our non-profit clients grow throughout these years and be a partner with them along the whole process.

Patrick Frambes:

Yeah. Absolutely. And I know one specifically that we had talked about last time, the transition from a smaller accounting firm, now working with us. And I think they had some delays in their audit issuance, just some delays back and forth with the clients. How has that improved from an efficiency standpoint from our end?

Christa Woelfel:

Yeah, it's definitely become a lot more efficient on our end with clients and we have been staying in communication better. And throughout the planning process, we want to make sure we're not just their auditors, we're their partners the entire year.

So, we've been staying in constant communication throughout the year to know what changes are happening, what growth is happening in the organization so that we can help them through that process. But also when it comes to be audit time, our team knows what to expect. We can let their team know what to expect, what's going to change, what might look different. There's going to be some different risks associated with them as they grow their operations. And we've been able to help them mold their finance team to be helpful with their new growth and operation strategy. So, new people are having new responsibilities and it's really helping everything flow smoother in the audit process.

Patrick Frambes:

Well, that's wonderful. Yeah, I know you mentioned being partners throughout the year. What are your thoughts on clients reaching out with questions throughout the year? Do you encourage that? I know we could sometimes question whether or not they'd be billed extra for that time, too. Maybe speak a little bit on that.

Christa Woelfel:

Yes. Absolutely, reach out to us during the year. We want to know what's going on in the organization year-round. Just like they don't like surprises come audit time, we don't like surprises as the auditors. So, we want to know what's happening, what's changing during the year.

If there are questions on how to account for something or process improvement, we like to be involved there. We're not going to nickel and dime them for every little email we answer, and it'll actually save us time on the backend knowing upfront what changes are happening.

Patrick Frambes:

Thank you. Yeah, I definitely want to encourage our clients to reach out to us throughout the year. Always like to say we're their auditors year-round, not just during the open time. So, it does make things more efficient for us.