



# Unleashing the power of integration.

Complete Controller used their migration to QuickBooks Online as an opportunity to create a seamlessly integrated bookkeeping model that offers more ease and efficiency for their small business clients, provides greater transparency and control for CPA firms, and produces significant savings for their bottom line.

## Overview

- Complete Controller wanted to improve its bookkeeping platform experience for its customers and CPA users by changing out hosted desktop applications for web-based Apps that were friendlier to integrate and host.
- They decided to adopt QuickBooks Online firmwide, putting new clients directly on QuickBooks Online and migrating existing clients from QuickBooks Desktop.
- Since making the migration, Complete Controller has increased their client base and improved client service while improving efficiency and reducing costs.

Increased their  
client base by 10%  
in 2020.

## Who is Complete Controller?



A 100% remote firm staffed entirely by QuickBooks ProAdvisors that provides bookkeeping, financial records storage, and performance reporting to small business clients across the country.



Collaborates closely with large CPA firms, often serving as the dedicated client accounting services solution for their small business clients.



Operates on a value pricing model, making efficiency essential to its profit margin.

## The challenge

After hosting QuickBooks desktop and document storage as part of their bookkeeping services for over a decade, Jennifer Brazer, founder and CEO, sought to move toward web-based Apps to promote an updated user experience, while maintaining the transparency and accessibility CPA firms have come to expect. While she knew that was the value proposition of QuickBooks Online, she also knew it wouldn't be easy to convince the firm's accountants and clients to make the change.

"Let's remember, this is the accounting industry," she said. "It took us a century to go from ledgers and pencils to software, and we were all pretty spoiled by the functionality of QuickBooks Desktop."

## The solution

Complete Controller found that more and more clients were coming to them with QuickBooks Online already in their tech stack. Seeing how rapidly the industry was moving in that direction, Complete Controller decided they should embrace this change—digging in, getting dirty, and finding out exactly what QuickBooks Online could do for them.

Those new clients became the springboard Complete Controller needed to make the decision to get their accountants QuickBooks Online certified. With the additional training, their accountants felt much more comfortable and began to embrace the transition.

The firm soon decided to adopt QuickBooks Online companywide. Brazer said a key driver was a push to program integration capability. It was difficult and expensive for Complete Controller to host programs outside of the web environment. The innovative new tools their clients wanted to use were all designed around QuickBooks Online.



**When it comes to QuickBooks Online, our customers have really seen the light because they like the integrations and everything they can do now.**

**Jennifer Brazer, Founder and CEO**



Inefficiencies can be costly, and that's why going with a standardized approach was the strategic decision that paid off. Budding entrepreneurs are also looking to run everything on their mobile devices, so having the web-based technology allows us to power the GL software, an audit-ready filing cabinet, and vendor bill management from within the company's branded mobile App. This is the future.

Support from Intuit also made the decision to migrate easier. “The dedicated Intuit team helped us with the conversion and gave us ways to introduce QuickBooks Online to a larger segment of our customer base,” Brazer said. “That was a huge motivator.”

## The result

Reinventing client accounting services as one of the first completely cloud-based accounting services in the country has paid off for Complete Controller in important ways. When COVID-19 hit, for example, the firm was able to respond nimbly, enabling them to overcome a 6% client loss and achieve 10% new growth in their client base. Brazer said creating an integrated model based around QuickBooks Online is a win-win-win, delivering the outcomes the firm wanted for their clients, their CPA partners, and their own bottom line:



### Ease

The firm’s clients can access all the apps they want directly from the Complete Controller desktop, and they are integrated with QuickBooks Online.



### Transparency

With easy access to standardized information, the firm’s CPA partners can maintain the control they want.



### Cost savings

The firm is saving 3% on basic system administration technology, plus another 5% in efficiency improvements.

## We hold ourselves accountable to you

Just as you are accountable to your clients, at Intuit, we take pride in being accountable to you. We are committed to partnering with large firms to invest in your success. Our Strategic Accounts Team is ready to help you succeed every step of the way, whether you’re rolling out a new program or transitioning to QuickBooks Online. When it comes to technology, we’ll work every day to be your trusted advisor, so you can be a trusted advisor to your clients. Our goal is simple: to make your firm look like a hero in the eyes of your clients.

