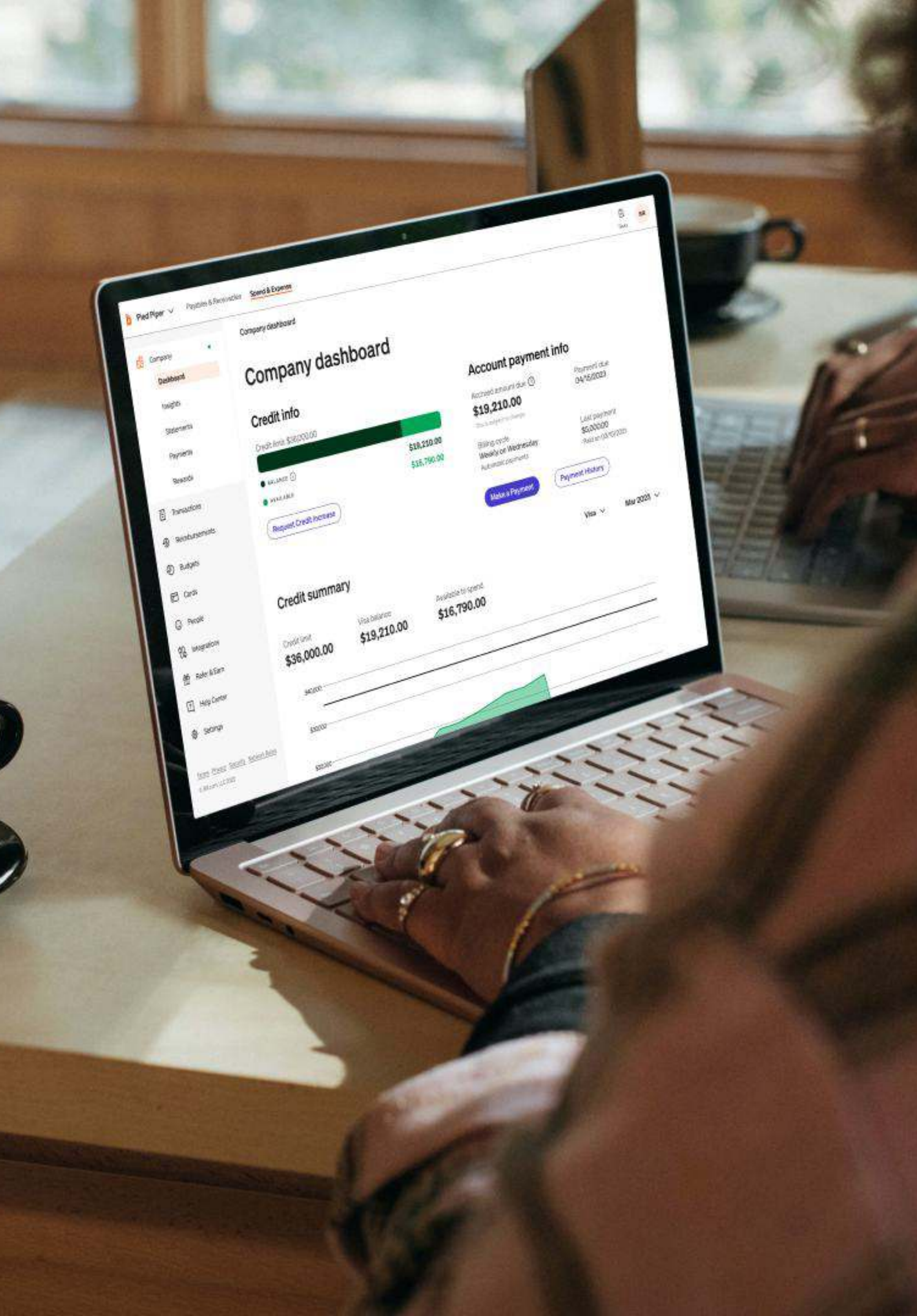




Guide to success with BILL Spend & Expense

Learn what works for real accounting firms



Learn how cutting-edge firms are growing their business with BILL Spend & Expense

Whether you're an established accounting firm or are just starting out, automating manual processes is an integral step in leveling up your practice and having more time to spend gaining new clients and pursuing higher-value services. From increasing efficiency to improving staff morale and making your clients happier, learn how these cutting-edge accounting firms are using BILL Spend & Expense to automate expense management and change the way they do business with clients.

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RLJ Financial Services, Inc:

Expenses are just the beginning



Caleb L. Jenkins

EA, CQP, Leader of Client Accounting Services

Started using BILL Spend & Expense: 2017

RLJ Financial is a full-service firm that works with individuals and small businesses to help them meet their goals through cloud accounting services, business profitability, tax planning and strategy, payroll services, cash flow management, and much more.

Firm size: 10 employees

Clients: 250 businesses; 600 individual clients

Vertical focus: Agriculture, healthcare, and service-based

rljfinancial.com





Our BILL Spend & Expense journey

RLJ Financial (RLJ) first learned about BILL Spend & Expense when they were looking for solutions for a client that was struggling with multiple types of cards and reimbursement challenges. RLJ looked for a best-in-class solution that was in line with their cloud-based, forward-looking firm philosophy and found BILL Spend & Expense.

Over time, the RLJ team realized that BILL Spend & Expense had even greater potential. They grew to love features like notifications to cardholders, reminders about incomplete tasks, and an easy-to-use transaction dashboard. “It's basically a bookkeeper's dream to be able to see what is complete and what's incomplete,” describes Caleb Jenkins, Leader of Client Accounting Services.

Plus the team found that in today's world, real-time financial insight is imperative to running a business, and BILL Spend & Expense offered that needed data. “The problem with traditional credit cards and statements is that they're so far delayed,” Jenkins explains. “In the modern era, we need to be able to complete things in real time to help clients make real-time, accurate business decisions.”

Before BILL Spend & Expense

- Duplicate and missing transactions
 - Tracking down receipts
 - No controls over expenses
 - Waiting 30–60 days for concrete spending info
-

After BILL Spend & Expense

- A single source of truth about spending
- Closing books in real time
- Advising clients on expense management and fraud reduction
- Accurate transaction tracking
- Reduced fraud



Training staff on BILL Spend & Expense

You learn by doing, so RLJ uses BILL Spend & Expense internally. First, they set employees up with a BILL Divvy Corporate Card and give them an account. Then, they have employees request funds when they need to spend. Using the process internally makes it clear how BILL Spend & Expense works and why it's valuable. Then it's easier for their staff focused on client relationships to recommend BILL Spend & Expense to clients and answer questions clients might have about setting it up.

Implementing BILL Spend & Expense for clients

RLJ doesn't require all their clients to use BILL Spend & Expense (yet), but the firm believes every client would be a good fit for the platform. They find that new clients are usually easily convinced to make the switch, because they came to the firm to solve their existing problems and BILL Spend & Expense is a major part of the solution. Sometimes they struggle to convince certain clients who are already devoted to their current credit card rewards, even though BILL Spend & Expense's overall value to a client is often greater.

Because RLJ has access to everything they need from both BILL Spend & Expense and the client, they can set up everything in BILL Spend & Expense to run exactly the way they want—and teach clients how to get the most out of it. It usually takes one to three weeks to get BILL Spend & Expense up and running for a client.

BILL Spend & Expense and closing the books

Because everything is automated through BILL Spend & Expense, closing the books for clients has become much faster and simpler. “We can typically have the books closed the second or third day of month,” says Jenkins. Part of the close involves doing a reconciliation in QBO simply for the purpose of locking in the transactions. Doing so quickly highlights reconciliation discrepancies in case someone deletes a transaction in error.

While RLJ doesn't close the books in “real-time,” it's pretty close if people are paying attention to BILL Spend & Expense. And once the data hits QuickBooks, they practically never have to touch that transaction again because it was completed correctly.

Pricing spend management services

The firm offers a strategic growth package, which includes BILL Spend & Expense and other solutions. “As far as the spend management advisory, we don't yet have that designed as a separate service offering,” Jenkins explains, “It currently just gets lumped in with what we do currently.” However, he also suggests that some customers don't value services unless they pay for them so they are considering adding this as a standalone service offering..

How BILL Spend & Expense changed our firm

Now that they spend less time tracking down expense details, RLJ can work on more important things, like the KPIs that matter for clients and business forecasting. It was much harder to focus on these benefits when they were stuck on transactions. “With BILL Spend & Expense, it should only take about seven to eleven seconds to complete a transaction,” describes Jenkins. “And when you multiply that by one hundred transactions a month, you're saving a tremendous amount of time.” RLJ finds this helpful in their client relationships, leading to more clients and an overall better work/life balance.

“One of the reasons I love BILL Spend & Expense is because I believe in the power of the application. When you connect the underlying card with software to manage your expenses, magic happens. The people at BILL are all incredibly helpful as well. I always love seeing a new message come through from my friends at BILL.”



Caleb L. Jenkins

EA, CQP, Leader of Client Accounting Services

Summit CPA:

Virtual CFOs simplifying expense management



Jody Grunden

Partner at Anders, Founder & Head
of Summit CPA Group



Jake Grimm

CPA, Director of Technology

Started using BILL Spend & Expense: 2020

Summit CPA, a Division of Anders CPAs + Advisors, was founded in 2002 in Fort Wayne, Indiana. They specialize in virtual CFO services, including forecasting, financial reporting, and spend management in order to maximize profits, minimize taxes, and increase cash flow for their clients.

Firm size: 65 employees

Clients: 175

Vertical focus: Digital Marketing Agencies (60%); Other (40%)

summitcpa.net





Our BILL Spend & Expense journey

Summit CPA (Summit) found that expense management for their clients brought with it several pain points because they struggled with lack of visibility and delayed reporting— plus clients had concerns that employees were overspending.

When Summit started recommending BILL Spend & Expense to clients, the advantages were obvious. They gained valuable visibility into the budgets, because BILL Spend & Expense provides real-time dashboarding where clients can sign in and see their current budgets and status. As Jody Grunden, Partner at Anders, Head of Summit CPA Group, describes, “It provides peace of mind,” and solves for client concerns around overspending.

Summit found that using BILL Spend & Expense allowed them to be more effective in cash flow forecasting and management, even on a weekly basis. They are now able to work with clients to set forecasts and expectations and advise on the results and trends they see, helping inform their CAS offerings for clients.

Before BILL Spend & Expense

- Lack of visibility into budgets
 - Lack of real-time reporting
 - Concerns about overspending
 - Time wasted while asking questions about spending
-

After BILL Spend & Expense

- Visibility into budget management
- Real-time dashboarding for clients
- Saved money by eliminating overspending
- Saved time with automatic categorization

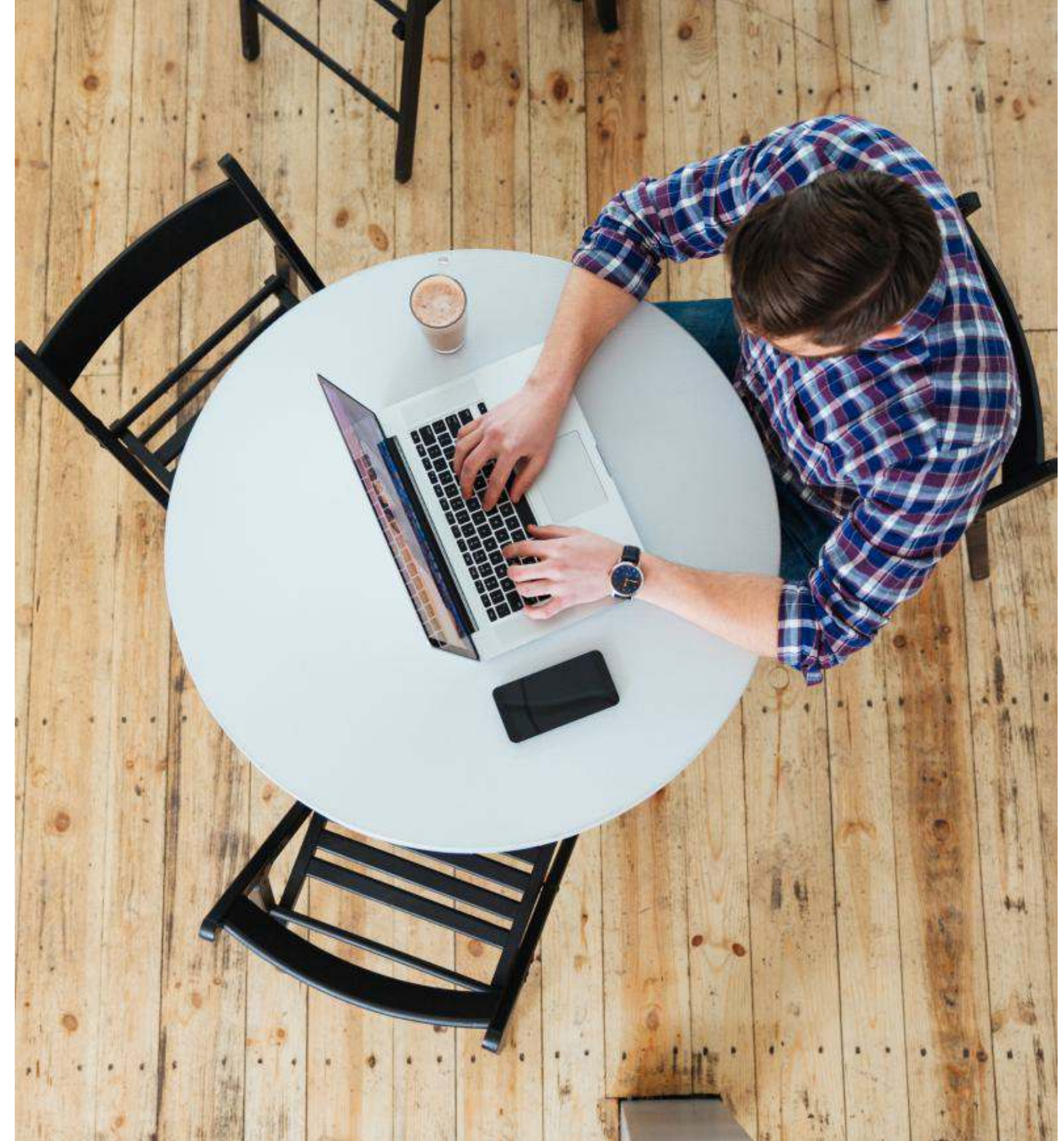
Implementing BILL Spend & Expense for clients

At Summit, the team believes everyone is a good candidate for BILL Spend & Expense, and would prefer it if all of their clients used the platform. If a client comes to them with no prior expense management software in place, it is an easy implementation to get them started on BILL Spend & Expense. It only takes an hour or two to get a client up and running, and that time investment is worth it.

Though not all of their clients are required to use BILL Spend & Expense, clients are often willing to make the switch because of the added value it brings. Jake Grimm, Director of Technology, says, “For an average client with 50 team members, they might save about \$600 per month using BILL Spend & Expense.”

Training staff on BILL Spend & Expense

“We don’t have any specific training on BILL Spend & Expense for our staff,” explains Grimm. “However, client managers have that background and kind of have that visibility into BILL Spend & Expense, and so when it comes up they will push it with clients a little bit.” They find that client managers that have other clients on BILL Spend & Expense are motivated to get more of their clients on the platform since they’ve seen the benefits not only for the client but for their own workflows.



Pricing spend management services

Summit has no long-term contracts with their clients and they offer weekly billing for services. To support this model, they created a pricing tool that they use when onboarding new clients and BILL Spend & Expense's no-contract platform was an easy fit into the offering.

One of the line items they can add to any package as a flat weekly fee is expense and spend management services. That fee scales up or down based on the size of the company (taking into account revenue as well as number of employees). For an average 50-person company, they charge \$80 per week for expense/spend management—reconciliation as well as advisory services.

How BILL Spend & Expense changed our firm

The biggest impact that BILL Spend & Expense has was helping Summit's accountants with credit card classification coding for transactions. It helps them save time hunting down details.

Summit also appreciates that BILL Spend & Expense helps eliminate the risk of team members overspending, which can help clients save money. And now that expense categorization is handled by spenders themselves, no one has to hunt down that information.

“I think everyone is a good candidate for BILL Spend & Expense. We would prefer to have all of our clients on it.”



Jody Grunden

Partner at Anders, Founder &
Head of Summit CPA Group

BILL Spend & Expense also has the added benefit of security features to protect from fraud. “I like having virtual cards set up for different vendors so you’re not relying on one card that’s being used in hundreds of different areas that could get compromised,” says Grimm.

When enough clients switched to BILL Spend & Expense, the Summit CPA team couldn’t ignore the time savings. “I would estimate it might save about two hours per week for some of our bigger clients,” says Grunden.

Ignite spot:

Close the books on time, every time



Dan Luthi
Ignite Spot Partner

Started using BILL Spend & Expense: 2019

Founded in 2007, Ignite Spot Accounting is focused on making businesses more profitable. They focus on all aspects of business finance, such as bookkeeping, software implementation, fractional CFO services, and coaching. The firm strives to build a close and beneficial relationship with each client.

Firm size: 21 employees

Clients: 240

Vertical focus: All

ignitespot.com





Our BILL Spend & Expense journey

Korbyn Gallegos, Controller at Ignite Spot, was attending a conference and had a specific problem neither he nor his client could solve on the client's existing expense management software. Even after talking with the software company's booth representative for an hour, he still couldn't make sense of it. Luckily there was also a BILL Spend & Expense booth at the conference, and they offered a solution that worked better for Gallegos and his clients.

With BILL Spend & Expense, Ignite Spot now finds themselves armed with the right tools to keep things running smoothly for their clients and themselves. They can now put the proper controls in place to save clients money and make closing the books each month easy. BILL Spend & Expense allows Ignite Spot to truly deliver on their mission of building a better relationship between accountant and client and empowering small businesses to take control over their finances and grow.

Before BILL Spend & Expense

- Days spent chasing receipts and missing transactions
 - No precise controls
 - Inaccurate forms
 - Manual reconciliation across multiple systems
 - Blind spots in clients' cash flow
-

After BILL Spend & Expense

- Books closed on time each month
- Proactive cash management solutions
- Increased advisory and coaching services
- Intuitive, clean platform interface

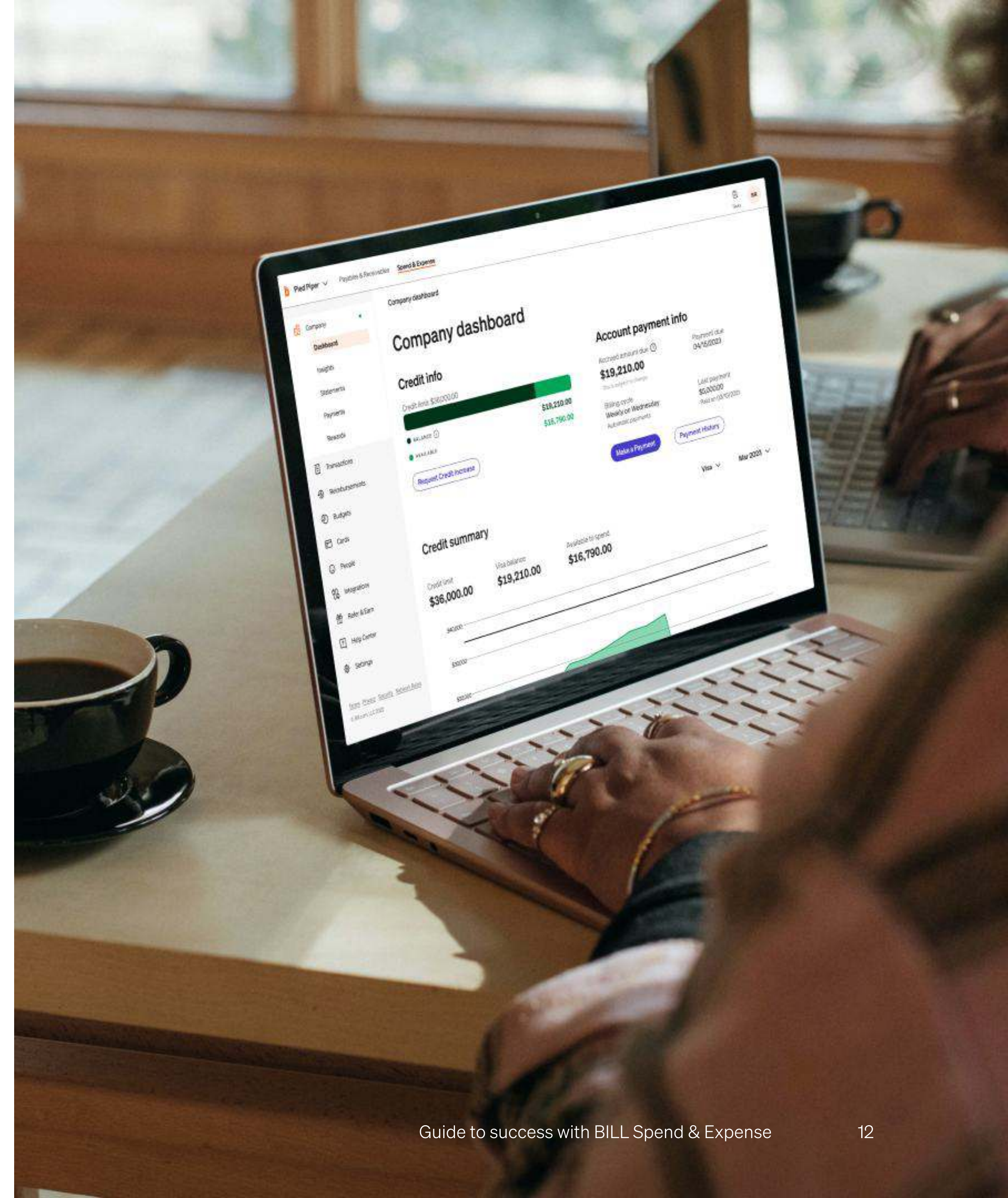
Implementing BILL Spend & Expense for clients

While Ignite Spot doesn't require all their clients to use BILL Spend & Expense, they find it an easy addition when onboarding new clients since it is free to use and has no contract. When pitching BILL Spend & Expense to existing clients, the Ignite Spot team starts by talking about the change in controls they will have and what functionality will empower their staff to be more involved in the spend management process.

Whether the client has existing expense management software or not, they suggest a phased roll-out so that the client can handle it. Getting clients up and running on BILL Spend & Expense typically takes two to three months. "After they start to use BILL Spend & Expense, we easily save 5-8 hours a month per client," says Dan Luthi, Partner at Ignite Spot.

Training staff on BILL Spend & Expense

Ignite Spot's team has first-hand experience using BILL Spend & Expense themselves. They use the platform for recurring expenses like software subscriptions and can immediately send their employees money whenever needed. Plus, employees have the added benefit of uploading receipts even when traveling. This makes it easier when pitching BILL Spend & Expense to clients since they have experience using it themselves and can speak to how user-friendly it is.



BILL Spend & Expense and closing the books

Closing the books is typically fraught with dozens of hours of data entry, receipt chasing, and transaction hunting. With BILL Spend & Expense, the process has become faster and smoother for the team at Ignite Spot. Instead of doing four to five times the work and scrambling to finish by the deadline, "We close the books on time every time," says Gallegos.

With BILL Spend & Expense, the Ignite Spot team can see exactly what the status is for their clients by the third, fourth, or fifth day of the month instead of waiting for the fifteenth. Then they can send notices to the employees who still need to submit their last few receipts, and the process is done.

Pricing spend management services

Ignite Spot has two steps to pricing spend and expense management for their clients: a set-up fee and an ongoing fee associated with overseeing budgets and spend management. "We start by pricing it as a set-up service," says Luthi, since it takes time for their team to get up to speed on the process changes and train them on how they want each client to use the platform. "Then we add in budgets and spend management as a part of our monthly control process for the client, and it becomes part of the overall monthly fee."



How BILL Spend & Expense changed our firm

BILL Spend & Expense allows the Ignite Spot team to help support their clients with proper spend management and empower them to take a more active role in the company expenses. It has allowed them to add more value to the clients by focusing on their total spend, instead of receipt chasing.

As a firm focused on building trust and close relationships with its clients, it was important for Ignite Spot to change how clients perceived their relationships with their accountants. BILL Spend & Expense empowers its clients to put controls in place, allowing their organizations and staff to make better decisions. By reducing administrative time and focusing on substantive conversations around cash flow and other advisory services, Ignite Spot can continue to deepen client relationships.

“By recommending BILL Spend & Expense to our clients, we have been able to cut down the amount of time chasing receipts not only for our clients but our firm as well. This has provided us with the ability to have deeper conversations about their financials more comprehensively.”



Dan Luthi
Ignite Spot Partner

Lescault & Walderman Accounting:

Incorporating technology into accounting processes



Matthew Lescault

Founder & President of Lescault & Walderman Accounting

Started using BILL Spend & Expense: 2022

Lescault & Walderman Accounting is a technology-forward firm headquartered in Rockville, MD. With clients across two continents, they are an outsourced accounting firm focusing on value-driven accounting services such as reporting, technology, and compliance for mid-market companies. They strive to create efficiencies through the utilization of technology to reduce tactical lower level bookkeeping work to allow staff to focus on controller level services, compliance, and reporting.

Firm size: 90 employees

Clients: 246

Vertical focus: Nonprofit, Healthcare, and Professional Services

l-wconsulting.com





Our BILL Spend & Expense journey

As a firm that focuses on using technology to reduce the amount of manual tactical bookkeeping work, the Lescault & Walderman Accounting team had been working with BILL for years when they were first introduced to BILL Spend & Expense. It intrigued them as an organization because of its capability to integrate with both Quickbooks Online and Sage Intacct, while also making it easier to manage cards. They now use BILL Spend & Expense to create virtual cards to reduce the amount of time they spend managing their accounts.

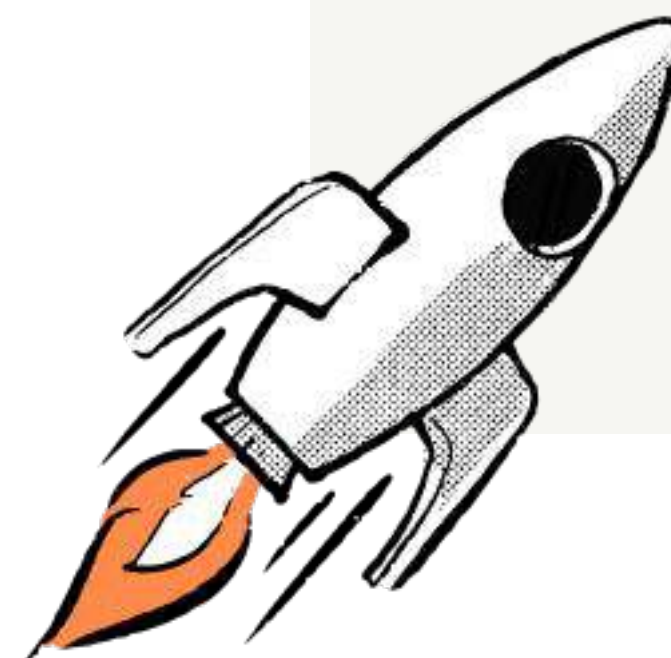
While Lescault & Walderman only recently started using BILL Spend & Expense for clients, they are already experiencing its benefits, including real-time data and insight into client spend, automatic syncing with accounting software, and pre-coded expenses.

Before BILL Spend & Expense

- Delays due to tracking down receipts
 - Challenges with syncing and integrations
 - Too much time spent on data entry
-

After BILL Spend & Expense

- Real-time coded receipts that are ready to go
- Expense management built into the BILL Divvy Corporate Card system
- Easy accounting software integrations
- Less time spent on data entry





Implementing BILL Spend & Expense for clients

Lescault & Walderman have only just started out recommending BILL Spend & Expense to their clients. It's a software they are genuinely excited to talk about because of the potential benefits. They have started to bring the idea up early as a part of client onboarding, rolling it into the initial proposal. They talk about the ease of use, simplicity of integration, and the value it provides to business owners—and they make sure to highlight the automation. Once the client is excited to use BILL Spend & Expense and is approved for an account the setup is minimal, “as BILL Spend & Expense takes on the brunt of the implementation work,” explains Matthew Lescault, Founder and President.

Training staff on BILL Spend & Expense

As Lescault explains, they use BILL Spend & Expense internally at their firm, which means, “We practice what we preach.” He and the staff have been very impressed. “I can't explain the value I've gotten out of it,” he says. Because staff enjoy using BILL Spend & Expense so much, it's easier for them to recommend BILL Spend & Expense to clients and get them started. They can also answer a lot of questions that might arise from clients about how BILL Spend & Expense operates from a user standpoint.

BILL Spend & Expense and closing the books

Because BILL Spend & Expense integrates seamlessly with Quickbooks Online and Sage Intacct, closing the books is more straightforward than before for the firm's clients using BILL Spend & Expense. Because of the level of automation built into BILL Spend & Expense, the firm is able to spend less time on reconciliations and more time on higher-value advisory services for their clients in line with their firm objectives.



Pricing spend management services

Currently Lescault & Walderman bill hourly, so with BILL Spend & Expense they are able to reduce their time around the tactical expense management tasks and reduce their cost to the client. But they are moving toward a fixed fee model that won't price their spend management services separately. Instead, they will be able to charge a fixed fee for their valuable advisory services, of which spend management is a part, and not for the manual busywork usually associated with expense management.

How BILL spend & Expense changed our firm

The Lescault & Walderman team agree that the biggest changes for the firm have been the easy integration and the benefits of automation. As Lescault explains, "We have a card product that we actually want to recommend."

With BILL Spend & Expense, Lescault & Walderman now have a valuable solution to offer clients. Fraud is more preventable and easily resolved, and business owners have greater peace of mind. Clients now have more freedom and less leg work to do, and one of their clients is saving 10–15 hours a week on managing expenses.

Internally, BILL Spend & Expense made it easy to track expenses and issue cards. While working on client financials, receipts and expense details are already available—they don't have to hunt down information or troubleshoot issues with credit cards or integrations.

The platform has also reduced the number of hours they spend on data entry. With that extra time, they can redeploy their resources to focus on higher-value initiatives throughout the firm, instead of low-level tactical projects.

"I can't find anything else that is this easy. This is a tech-backed card, and we don't have to spend extra time on administrative issues. Most competitors are just credit cards."



Matthew Lescault
Founder & President of Lescault
& Walderman Accounting

Squire & Company:

No one likes expenses—
until they use BILL Spend & Expense



Megan Bronson
Advisory Partner

Started using BILL Spend & Expense: 2017

Squire & Company is a full-service accounting firm based in Utah that focuses on using technology to make their clients' lives easier. With 50 years of experience, the firm focuses on advisory, controller, virtual CFO, and business services. They are also a trusted BILL partner to implement and augment best practice processes and technology for growth companies across the globe.

Firm size: 200 employees

Clients: 6,000

Vertical focus: Professional services, construction, direct selling, technology, consumer products, and more

squire.com





Our BILL Spend & Expense journey

When Squire & Company (Squire) first learned about BILL Spend & Expense, the team appreciated that it would allow clients to be proactive about spending and budgets—and the fact that it was free to use was a big part of the appeal.

Squire focuses on training clients on the importance of a single point of data entry and empowering those who are taking the purchasing action supplying the needed information simply and seamlessly with low time commitment from employees. Advisory Partner Megan Bronson explains that she personally loves to show clients how they can take things to the next level: “The biggest thing about BILL Spend & Expense was this shift from reacting to spending after it happened to having a proactive conversation and thinking about that spending before it happens.”

Before BILL Spend & Expense

- Complicated expense management processes
 - Difficulty tracking receipts
 - Mistakes that were difficult to fix
 - Employees using their own funds for company purchases and waiting for reimbursements
-

After BILL Spend & Expense

- Visibility and accountability at every step of the process
- A free tool that’s easy to use
- Partnership with a company they can trust
- Eliminating the need for employee reimbursements

Implementing BILL Spend & Expense for clients

Squire has seen their client base grow quite a bit in the last few years and Bronson has made sure that BILL Spend & Expense and their other recommended apps are at the forefront of onboarding those new clients. Their NetSuite implementation team also handles implementation for BILL Accounts Payable, BILL Accounts Receivable, and BILL Spend & Expense—so it is an integrated experience for clients. “I would say BILL products are the top tech that we recommend,” she says.

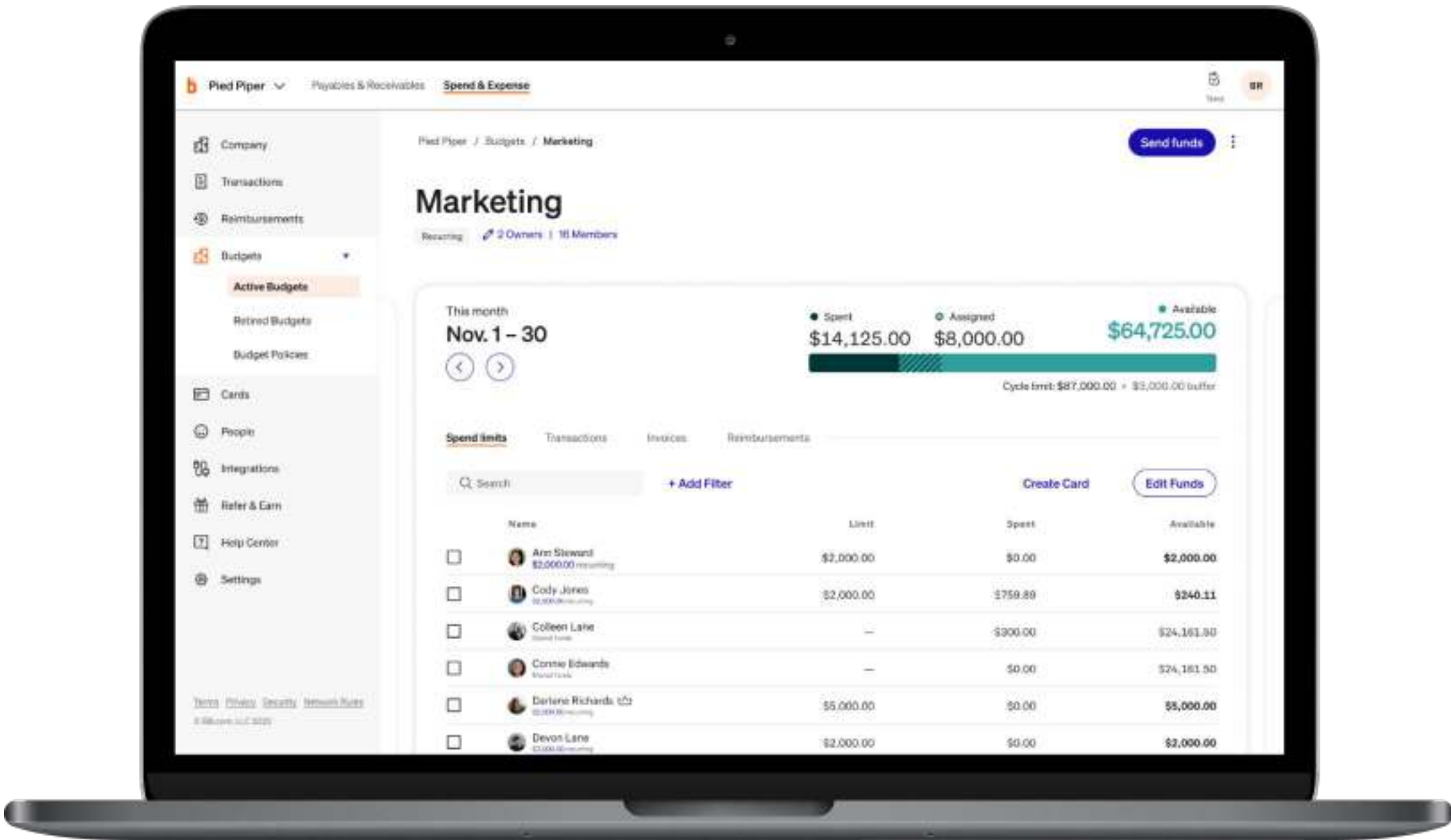
Not all of their clients use BILL Spend & Expense, and they don’t make it a requirement. Instead, it’s a suggested part of their tech stack. As Bronson describes, “If the client is resistant to the idea, sometimes we have to plant a lot of seeds along the way, or we have to keep nudging them.”

Training staff on BILL Spend & Expense

At Squire, the NetSuite implementation team are the resident experts on BILL Spend & Expense because they handle the integrated applications for clients and are a key part to onboarding new clients at Squire. Their outsourced accounting team has staff trained to help keep BILL Spend & Expense maintained for their clients once they’ve been onboarded, but for the most part the firm is able to just implement and let the client take it from there. BILL Spend & Expense’s support team is also always available for ongoing questions and concerns, so the staff always feel supported if questions arise.

BILL Spend & Expense and closing the books

While closing the books is faster for the Squire team when clients use BILL Spend & Expense, Bronson also sees a more reliable process with fewer errors. She says, “We have a lot of clients who don't have corporate cards at all. And so every bit of spending that's a bill or ACH transaction happens on employee credit cards. Then there has to be an expense report and that process takes time. There's a lot of opportunity for error.”



Pricing spend management services

Spend management is priced on a case-by-case basis as the Squire team gets to know a client and understand their needs. When a client asks the firm to help process reimbursements, Squire is quick to point out that if they just implement BILL Spend & Expense, they will save that time and money. In these cases, BILL Spend & Expense is included as part of a fixed fee, and it adds value for the client because, as Bronson explains, “No one likes expenses and reimbursements, but when it’s all on your phone with BILL Spend & Expense, and there is this cool technology, there is a lot more buy-in. And they really like that!”

How BILL Spend & Expense changed our firm

BILL Spend & Expense provides Squire’s bookkeepers with more efficiency. And, as Bronson describes, “It makes them feel like they’re not just a bunch of monkeys typing in data.” Instead, the data is available for them, while the bookkeepers make sure everything runs smoothly. They find this improves morale.

They also have found that it’s changed their relationship with their clients. Instead of being “a necessary evil,” Squire can focus on creating positive experiences with their clients where clients know the firm is there to help and take a burden off their shoulders. Now the Squire team can be proactive about advising and budgets.

“No one likes expense reports. No one likes filling them out. No one likes turning them in. But when they can start doing it on their phone? Then we’re bringing them this cool technology. It’s helping to improve their culture. And so we become a more trusted advisor and we use BILL Spend & Expense as that vehicle.”



Megan Bronson
Advisory Partner

Chaney & Associates:

Incorporating technology into accounting processes



Steve Chaney

Founder & Advisory Partner

Started using BILL Spend & Expense: 2019

Chaney & Associates is a complete accounting and financial management firm based in Roseville, California. The firm offers comprehensive payroll services, bill pay, and organization management and consulting services. They primarily serve churches and faith-based organizations and focus on improving client experiences and cutting down on non-billable manual busywork through the use of a standardized tech stack for all their clients.

Firm size: 17 employees

Clients: 1044

Vertical focus: Churches and faith-based organizations

chaneyassociates.com



CHANNEY & ASSOCIATES
Collaborative Stewardship





Our BILL Spend & Expense journey

The Chaney & Associates team struggled with expense management for years. All of their clients had different kinds of personal credit cards, or, as Steve Chaney, Founder & Advisory Partner, puts it, “Every kind of stupid card in the world.” Tracking down the information they needed was a difficult and time-consuming process. As Chaney describes, “If I had to rank my frustration on a scale of 1 to 10, it would have been a 12.”

Chaney first heard about BILL Spend & Expense from a client in Texas in 2019, so he looked into it and test drove the platform on his own firm. It made a lot of sense to him, so he recommended BILL Spend & Expense to a client that hated their existing card system—and they loved it. Now the platform works so well for his firm that he actually requires that clients use BILL Spend & Expense in order to do business with Chaney & Associates. Best of all, Chaney & Associates has been able to grow their client base to over 1000 clients while cutting down on staff needed to support that number at the same time because of implementing BILL Spend & Expense and other automation tools like BILL Accounts Payable and BILL Accounts Receivable.

Before BILL Spend & Expense

- Chasing down receipts and expense details
 - Tedious manual processes
 - Complicated reimbursements
 - Multiple kinds of credit cards with multiple banks
 - Staff working overtime and on weekends
-

After BILL Spend & Expense

- A single, easy-to-use dashboard
- Easy expense tracking
- Saved time
- Happier clients
- One corporate card that can be issued to every employee
- Better work/life balance for staff

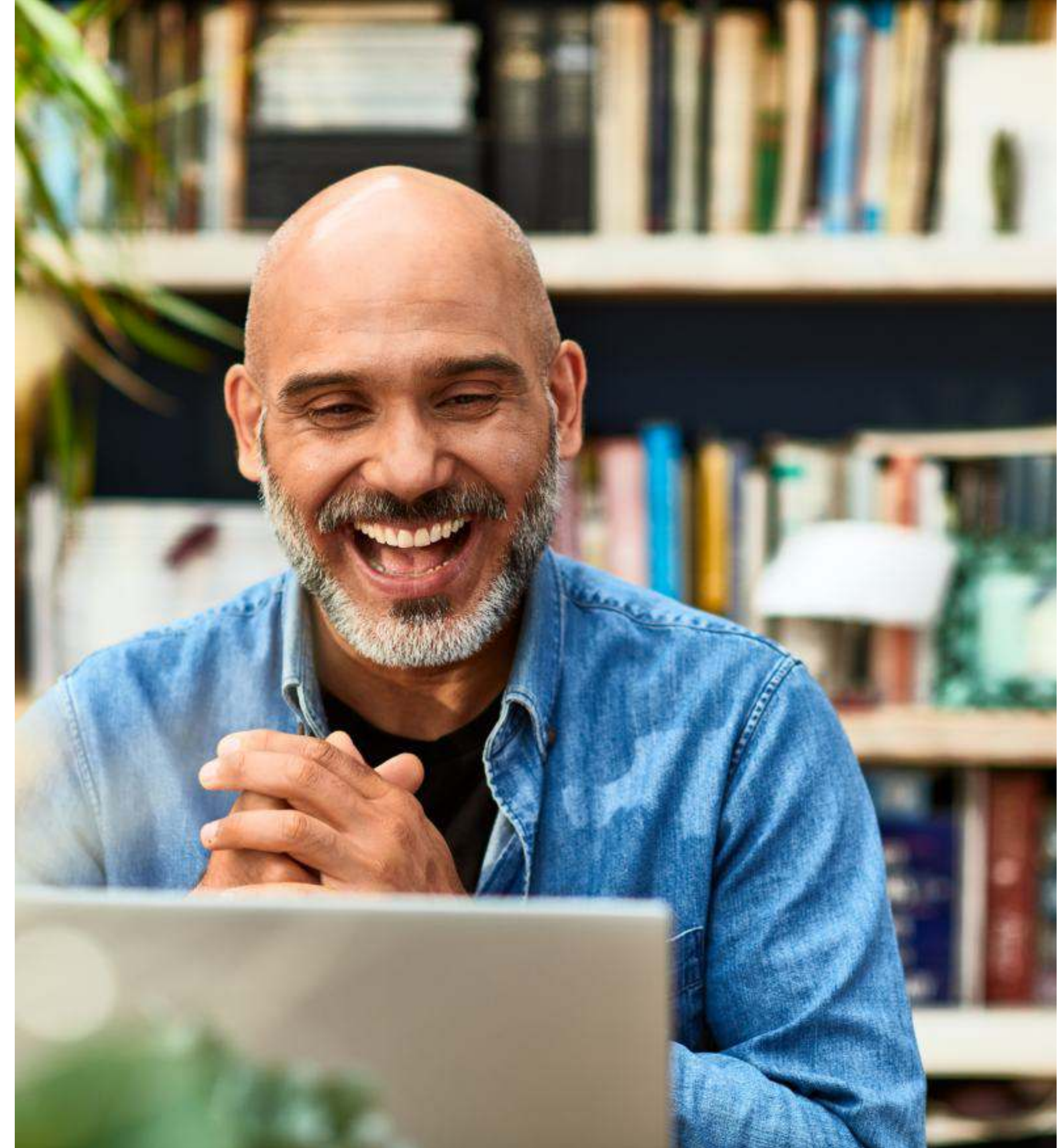
Implementing BILL Spend & Expense for clients

Clients come to Chaney & Associates because they want to do things better, so BILL Spend & Expense is usually an easy introduction. The firm can explain how it works in ten seconds, and the client is usually on board with it. “The first thing a client signs with Chaney & Associates is their contract or engagement letter,” says Chaney. “The second thing is their BILL Spend & Expense application.”

If a client doesn’t want to switch to BILL Spend & Expense, Chaney believes it’s probably not worth it to work with them. He admits that it’s hard for some clients to give up the rewards that they’re used to, but he tells them, “You can’t step over dollars to pick up pennies. With real-time numbers, closing the books weekly, the administrative burden and salary that are offloaded will save you more than points ever will.”

Training staff on BILL Spend & Expense

BILL Spend & Expense is so easy to use that Chaney finds his staff need minimal training. He can get new employees up and running with new clients quickly. He can also redistribute client workload if he is down any staff in a way that doesn’t put too much extra strain on his remaining staff. A short explanation is usually all that is needed, and the software is intuitive and straightforward.



BILL Spend & Expense and closing the books

Closing the books used to be a long, arduous process for the firm fraught with multiple cards and bank accounts. But now that the firm has real-time numbers through BILL Spend & Expense and automatic syncs with accounting systems, they can close the books for their clients weekly. “Now we have an automated system that drives itself,” says Chaney, “and that’s BILL Spend & Expense.”

In addition to weekly reconciliations, BILL Spend & Expense’s fraud protection makes it easier to close the books because staff don’t have to spend hours on the phone sorting out fraud in the event that something goes wrong. “It’s so easy to dispute a transaction on BILL Spend & Expense,” says Chaney. “All of that burden comes off the shoulders of the firm.”



Pricing spend management services

At Chaney & Associates, spend management isn’t priced as a separate service, but instead it’s part of a fixed fee for accounting and advisory services. For them, spend management and using BILL Spend & Expense is just a warm up before bigger picture advisory opportunities like budget planning, which is even more important to their clients who tend to be nonprofits, churches, and faith-based groups.

BILL Spend & Expense also has zero subscription fees unlike other expense management platforms, which appeals to their client base as well. Because it is free to use, BILL Spend & Expense enables Chaney & Associates to quote a price for their overall services to their clients and honor that price.

How BILL Spend & Expense changed our firm

The biggest change BILL Spend & Expense has made for Chaney & Associates is that they can take on more clients with fewer staff. They were even better able to manage their workload when four employees left all at once to pursue opportunities in other fields. Because BILL Spend & Expense automates so many processes, it was easy to train new staff on the details of managing the software and for other staff to take on additional clients without too much added burden.

When the platform is this easy to work with, they would likely be able to serve 2,500 people with their current 17-person staff—and continue to give them a healthy work/life balance. “Before we implemented BILL, we couldn’t get past 75 clients,” says Chaney. “Once we started using BILL, we quickly went to over 200 clients. Today, we serve 1044 clients, and that’s because we use all the BILL products together.”

Chaney has also been impressed with the income changes. “Sometimes small firms will see a spike in income, and then they’ll just crash,” he describes. “Well, not only did we spike, but we also continued to grow.”

Really, BILL Spend & Expense is a no-brainer for his firm and clients. As Chaney says, “It’s free, why wouldn’t you use it?”

“Now we are always in front of spend management instead of behind it. That’s what technology has done for us. My staff can lead clients in real time instead of constantly being 45 days behind.”

My clients tell me, ‘BILL Spend & Expense is the biggest game changer you’ve added in a long time.’”



Steve Chaney
Founder & Advisory Partner

Breakwater Accounting + Advisory Corp:

Not “one size fits all”



Amy Marshall
Director of Workflow Solutions

Started using BILL Spend & Expense: 2019

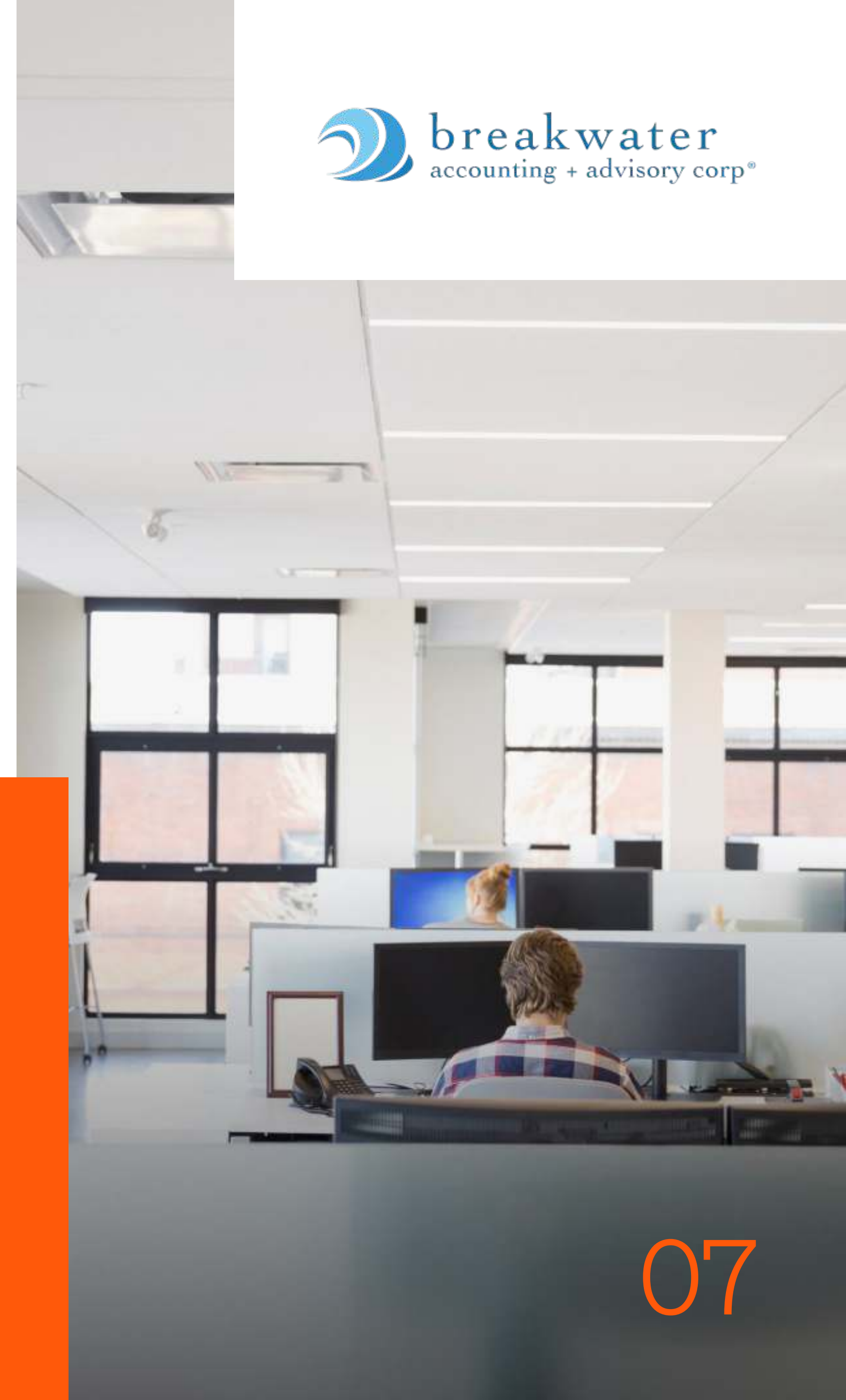
Breakwater Accounting +Advisory Corp. is a cloud-based, forward-thinking accounting and advisory firm that believes in adapting a solution to fit each and every client. Their goal is to create financial peace of mind for all of their clients through the right technology and support.

Firm size: 60 employees

Clients: 300

Vertical focus: Start-ups, small businesses, independent consultants, and nonprofits

breakwatercorp.com





Our BILL Spend & Expense journey

Amy Marshall, Breakwater Accounting + Advisory Corp's (Breakwater) Director of Workflow Solutions, first heard about BILL Spend & Expense when the co-founder of Breakwater called her to take a look at BILL Spend & Expense as a possible spend management solution for their clients. From there, Breakwater rolled out BILL Spend & Expense with a single client and did a case study on that client using the platform. They found that the solution worked and they have been recommending BILL Spend & Expense to clients ever since. Marshall says, "BILL Spend & Expense allows us to be more accurate and efficient in our work. Which is awesome!"

"BILL Spend & Expense is not a hard sell, because it's free and low risk."

Amy Marshall

Director of Workflow Solutions

Before BILL Spend & Expense

- Reactive expense processes
 - Multiple methods for managing expenses and reimbursements
 - Reconciliation was very manual and time consuming
 - Lack of visibility and control
 - Exposure to fraud
-

After BILL Spend & Expense

- Proactive and intentional
- Real-time visibility and control
- One place for all expense management
- Integration of accounting software
- Reduced time spent on reconciliation
- Fraud control with virtual BILL Divvy Corporate Cards

Implementing BILL Spend & Expense for clients

When Breakwater onboards a new client, they propose all of their services and tech stack from the beginning, including BILL Spend & Expense. Starting the conversation about BILL Spend & Expense with new clients is easy. “It always comes up,” says Marshall, “We ask, ‘how many credit cards do you have?’ It’s a natural way to bring up all the things BILL Spend & Expense can do for them.”

Then if the client is interested they schedule a BILL Spend & Expense discovery call with the client and Breakwater team. Sometimes if the client wants to see a demo or ask additional questions, they schedule a call with the BILL Spend & Expense team. Once the client is ready for BILL Spend & Expense, the Breakwater team likes to be very involved in setting it up for their clients, so they handle that internally.

Breakwater finds the biggest shock to clients is how much control they have over spend before it happens. Marshall explains, “We work with people who thought they had control over 11 credit cards, but ultimately they felt out of control. But with BILL Spend & Expense, they issue hundreds of cards and feel more in control than ever before.”

Training staff on BILL Spend & Expense

When Breakwater first started using BILL Spend & Expense for clients, they had the BILL Spend & Expense team come in and train their staff regularly on not only the software, but also on tips for how to pitch and implement it with clients. Now they find they are self-sufficient enough to train internally on how they prefer to use BILL Spend & Expense for their clients. But they know the BILL team is always there to help if a question comes up.

Breakwater also uses BILL Spend & Expense internally at the firm, so their staff is familiar with how it works, which makes answering questions from clients even easier. This familiarity also comes in handy because the Breakwater team likes to set BILL Spend & Expense up custom for each client.

BILL Spend & Expense and closing the books

BILL Spend & Expense has reduced or even eliminated the manual work of receipt tracking and credit card reconciling for the Breakwater team. So what once was a bi-weekly and reactive task can now be done proactively through the BILL Spend & Expense platform, allowing them to close the books faster. Marshall says, “In addition to control of spend, the client sees the benefit of a quicker close of the books.”

Pricing spend management services

At Breakwater, they offer BILL Spend & Expense with a one-time implementation fee—and because it saves the firm so much time, they don't feel the need to charge much more than that. Occasionally if a client's expenses are more complex and require a bit more hands-on work in the software to help, they will add a very small monthly fee in addition to the implementation charge.

How BILL Spend & Expense changed our firm

Breakwater finds that bill pay, spend management, and payroll are usually the biggest client pain points, and now with the addition of all BILL's products, they have solutions for most of their clients' problems. BILL Spend & Expense has also reduced or even eliminated the manual work of receipt tracking and credit card reconciling for the Breakwater team, making spend management now a proactive practice instead of a reactive necessity.

Marshall appreciates the relationship BILL Spend & Expense has with her firm. She explains, "We use the product every day and can provide feedback and BILL Spend & Expense allows us that platform to give feedback from our clients and staff."

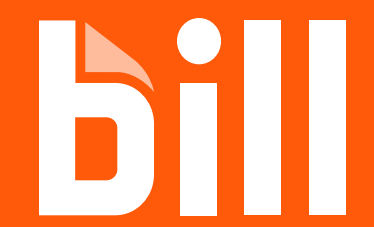
"Clients are shocked at the level of control. They think they are in control without BILL Spend & Expense, but they aren't."

We work with people who thought they had control over 11 credit cards, but ultimately they felt out of control. But with BILL Spend & Expense, they issue hundreds of cards and feel more in control than ever before."



Amy Marshall

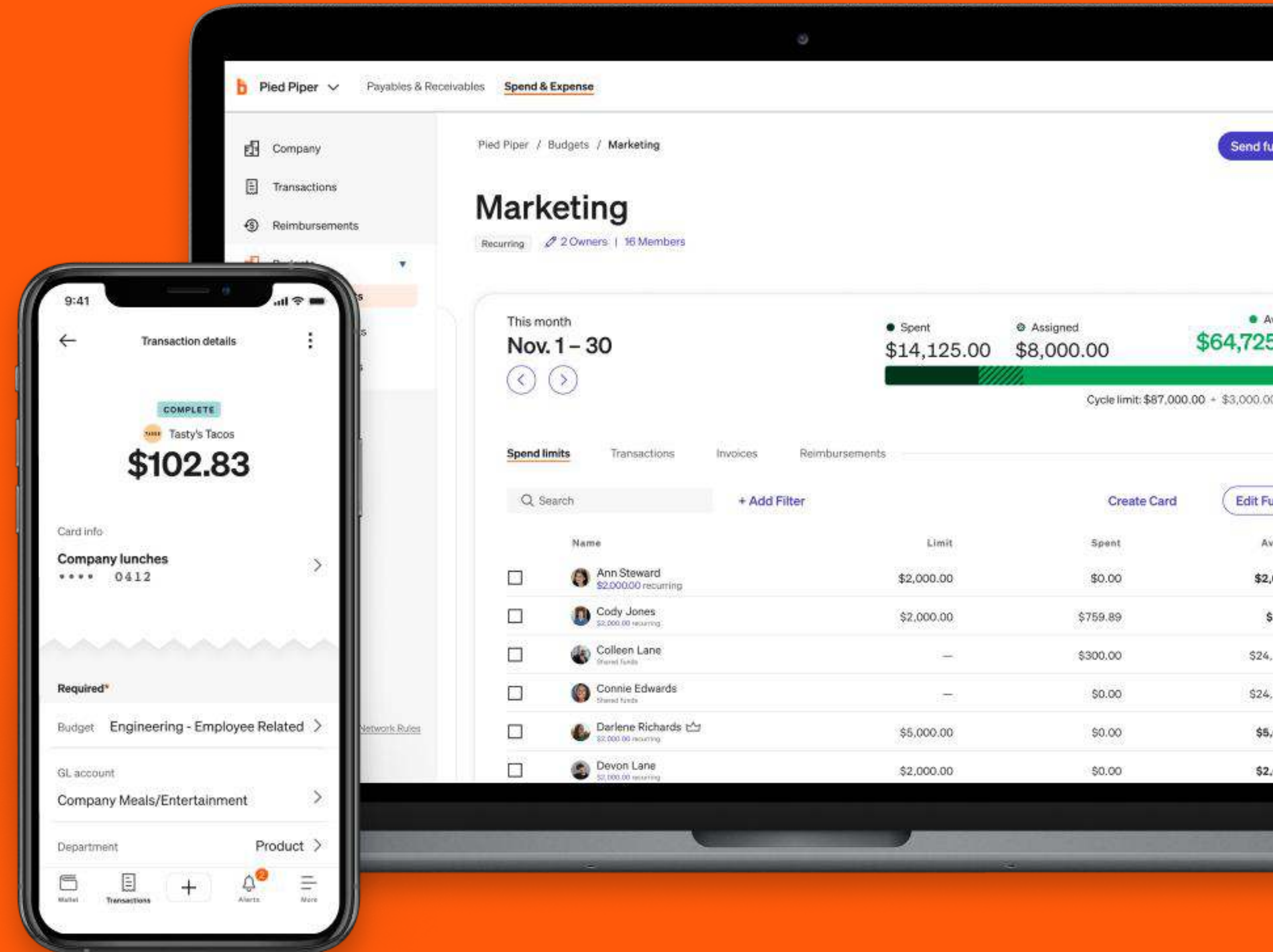
Director of Workflow Solutions



Ready to help your clients spend smarter?

Reach out to your partner manager today or visit **bill.com/for-accountants**

GET STARTED



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