

**bill**

# How 4 firms increased their bottom lines with BILL



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Introduction

Let’s talk ROI

Growth—and ultimately profit—can challenge even the savviest firms. Part of the challenge is how your accounting firm will grow. After all, successful growth has different definitions.

Will you expand your services? Focus on growing revenue with clients? Focus on efficiency to improve margins?

However you plan to grow, BILL can help. The BILL Financial Operations Platform includes AP, AR, spend & expense management, and insights & forecasting. As a result, firms can help their clients pay and get paid, track expenses, control spend, and fuel better business decisions faster.

The proof is in the results for many firms. In this guide, four firms discuss how they’ve leveraged BILL to improve their bottom lines. From revenue gains to increased capacity and beyond, here are their stories.

“Before BILL, when we were working manually, the max a junior accountant could handle was about five clients comfortably. Now, they can each manage between seven and nine clients.”

Jennifer Klos  
  
Supervisor Staff Accountant,  
Creative Planning Business  
Services







**Jitasa gets a 20% gross  
margin gain with BILL**

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## About the firm

As the nation's largest accounting and bookkeeping services provider for nonprofits, Jitasa is dedicated to improving efficiency and effectiveness within their clients' organizations.

**BILL products used:** AP/AR, Spend & Expense

**Number of employees:** 400+

**Number of Clients:** 1,300

**Industry focus:** Nonprofits

**Integrations:** QuickBooks Online, Sage Intacct

## Why Jitasa chose BILL

Prior to adopting BILL, many of Jitasa's clients were using paper-based accounts payable processes, which was a massive pain point. Another challenge came from expense management and volunteers. "There's not a lot of good controls around handing cash to an individual," explains Brock Burgess, Managing Director of Client Services for Jitasa.

"When we implemented BILL AP back in 2018, we basically drew a line in the sand and said we're not going to support our clients on any other platform," says Burgess. "Once a client is on BILL Spend & Expense, it speeds up the reconciliation of expenses by not having to wait on them to get the coding back. BILL provides us with almost real-time financial reporting."

## How clients have responded to BILL

BILL AP helps Jitasa ensure that clients do not overdraw bank accounts, plan ahead, and are financially sustainable. From an expense management perspective, BILL Spend & Expense helps clients control spend for multiple programs and events—and gives them 100% visibility.

"Once clients complete the initial implementation of BILL Spend & Expense . . . we found that they absolutely love it," says Alex Arbogast, Marketing Specialist at Jitasa.

## BILL ROI

BILL Spend & Expense saves Jitasa three to five hours a week in processing time per client. "We don't have to wait for expenses to be coded in a worksheet, wait for the client to review, and then get it back and implement it into QuickBooks," says Arbogast.

In addition to efficiencies, BILL Accounts Payable has helped the firm develop a better staffing model and realize a 20% gross margin gain.

**"From a cost perspective, we achieved a 20% gross margin gain within the AP process by implementing BILL Accounts Payable."**

**Brock Burgess**  
Managing Director of Client Services, Jitasa





**Creative Planning Business Services creates major efficiencies and more time for advisory services**

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About the firm

Creative Planning Business Services is a leading professional services firm that offers customized business, financial, and technology solutions to address the most complex business challenges.

**BILL products used:** AP/AR, Spend & Expense

**Number of employees:** 628

**Industry focus:** Charter schools, non-profits, for-profits

**Integrations:** QuickBooks Online

Why Creative Planning Business Services chose BILL

Creative Planning Business Service's clients lacked insight into cash flow due to paper-based processes and archaic technologies. They also had multiple, unorganized credit cards and expense management systems.

“We often have to cut paper checks. We are sending them with a mail stamp machine, the whole 9 yards. It is labor intensive,” says Jennifer Klos, Supervisor Staff Accountant.

Also, a lack of coordination around statement closes and autopay meant that many schools go through the month carrying almost double balances. Clients had no way to effectively issue more cards, so expenses were being run through one card shared by many individuals.

Adopting BILL streamlined the process across clients and within the firm, saving massive amounts of time and freeing staff to take on higher-value work.

How clients have responded to BILL

BILL has helped bring Creative Planning's nonprofit clients into the modern era. The system has provided access to current data and full transparency into the numbers for clients, which they love. It’s also helped eliminate duplication of expenses and overpayments.

“Clients on BILL Spend & Expense have had nothing but good things to say about it and how much it has saved them time,” Klos stated.

BILL ROI

Major boosts in efficiency and time savings opened up space to elevate advisory services—supporting a profitable, recurring revenue stream. Digital AP enables more meaningful, intentional payment times, and BILL Spend & Expense helps support automated, continuous closes that take only a few minutes per client.

“Before BILL, when we were working manually, the max a junior accountant could handle was about 5 clients comfortably. Now, they can each manage between seven and nine clients.”

**Jennifer Klos**  
Supervisor Staff Accountant,  
Creative Planning Business Services





**New Age Business  
Solutions creates client  
advisory services “super  
employees” with BILL**

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## About the firm

New Age Business Solutions is a consulting firm providing bookkeeping, accounting and finance advisory, business process outsourcing, digital transformation, and tax compliance services.

**BILL products used:** AP/AR

**Number of employees:** 4

**Number of clients:** 22

**Integrations:** QuickBooks Online

## Why New Age Business Solutions chose BILL

“I wanted to make it easy for more companies to get the reliable accounting data they need to make short-term and long-term decisions,” says CPA and New Age Business Solutions founder Jake Koontz.

“Because we do this for so many different companies, one of the biggest challenges we face is building processes and procedures that mesh well with our clients’ current environments while meeting our own high standard. For AP and AR, the choice is easy. BILL integrates seamlessly with the biggest players in accounting software and ERPs, and onboarding is a breeze,” explains Koontz.

## How clients have responded to BILL

The ability to provide clients with reliable data in real time supports the firm in making informed short- and long-term business decisions. By leveraging BILL, New Age Business is able to provide efficient, streamlined financial solutions—including high-value advisory services at an affordable fixed fee. Clients love the service and the ability to eliminate tedious clerical work.

## BILL ROI

ROI has come in the form of efficiency gains. According to Koontz, it has elevated his staff to the level of “super employees.” This allows New Age Business to take on more work without adding resources or burning out existing staff.

“CAS is a core offering for us, included in our monthly fee,” Koontz says. “The whole CAS side developed from being able to get out of the weeds—BILL makes that clerical work go away.”

**“BILL makes us incredibly efficient ‘super employees.’ Without it, we wouldn’t have a business.”**

**Jake Koontz**

CPA, Owner, New Age Business Solutions



**Chaney & Associates  
serves more than 1,000  
clients with a staff of 17**

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## About the firm

Steve Chaney, CPA, says his firm’s mission is to empower churches and faith-based nonprofits to wisely steward their resources through cloud-based accounting services so they can focus on ministry.

**BILL products used:** Spend & Expense, AP/AR

**Number of employees:** 17

**Number of clients:** 1,100

**Industry focus:** Churches, faith-based non-profits

**Integrations:** Xero

## Why Chaney & Associates chose BILL

Before BILL Spend & Expense, Chaney & Associates' clients used disparate expense management systems while their clients’ employees each used a preferred card. This made it impossible to scale services and grow.

“Before Spend & Expense, it could take us up to 10 hours a month trying to make sense of all the expenses of one small client,” said Chaney. And since the firm offers fixed fees for their services, all those hours ate into their profits.

Chaney & Associates discovered that BILL Spend & Expense helped gain more control over finances and unlock the power of continuous close.

“We don’t serve people who don’t use Spend & Expense,” Chaney says.

## How clients have responded to BILL

“My clients love Spend & Expense. They tell me, ‘Spend & Expense is the biggest game-changer you’ve added in a long time,’” shares Chaney.

Clients also have far more control over spend with real-time expense tracking. This offers peace of mind that data is accurate—supporting data-driven business decisions.

“Thanks to BILL Spend & Expense, closing the books for a client, regardless of their size, takes five minutes,” says Chaney.

## BILL ROI

Time savings is at the top of the ROI list for Chaney & Associates. And that time savings has allowed Chaney to expand its business.

“Thanks to BILL Spend & Expense, closing the books for a client, regardless of their size, takes five minutes. Whether you have a hundred or a million rows of transactions, Spend & Expense does it all for you,” says Chaney.

**“With BILL Spend & Expense, our staff of 17 can easily serve 1,100 clients. We can serve more clients in less time—focusing on other high-value client services beyond expense management. Serving more clients has enabled us to experience a spike in income.”**

**Steve Chaney**  
Managing Partner, Chaney & Associates



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## Explore your ROI potential with BILL

Take a demo of BILL AP/AR and BILL Spend & Expense.

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If you're BILL customer and want to learn more, [send us an email](#), and we'll connect you with your account manager.

