



CASESTUDY

Increased Quality Service & On Time Delivery With Cost-Effective Solution

CLIENT PROFILE

For more than 40 years, Godfrey and Associates, an accounting and consulting firm, has catered to its client's needs, handling everything from tax planning and financial reporting issues to business consulting and client accounting services. While it offers the resources and expertise provided by many larger firms, Godfrey and Associates prides itself on giving each individual client personal service that's accessible easily by them. Their Services includes:

- ↘ **Tax Preparation**
- ↘ **Tax Planning**
- ↘ **IRS and State/Local Representation Payroll Services**
- ↘ **Bookkeeping**
- ↘ **Sales Tax Returns**
- ↘ **QuickBooks Training**
- ↘ **Business Consulting**

HOW DID WE ENGAGE WITH THEM?

PABS (Pacific Accounting & Business Services) aims at providing high quality book-keeping, tax preparation and financial reporting services to businesses across the U.S., Australia and beyond. We are perceived by our clients as dependable, quality-conscious partners assisting the clients to achieve their goals. We provide services to CPA firms. PABS is a one-stop solution that helps CPA'S in several ways:

- ↘ **Lower cost**
- ↘ **Effective solutions**
- ↘ **Quick turn-around**
- ↘ **Make better use of your Key Staff**
- ↘ **PABS works with many industries using a large variety of software programs**
- ↘ **Built in "Social Distancing" while retaining attentive customer service**

CHALLENGE

GROWTH OPPORTUNITY:

Godfrey and Assoc has a large client base and struggles to hire the necessary resources to take on more clients. In addition, the client-support workload with PPP loans, tax return requests, and accounting clean-up was difficult to maintain.

WORK LIFE BALANCE:

Each year during the tax season, the staff works long hours and extra days to keep up with the workload.

HIGH EMPLOYEE CHURN RATE:

One of the challenges that every CPA firm face is the employee turnover. The investment in cost, time and effort to train the employee was high.

SEASONAL WORKLOAD:

The cost of staffing to meet the seasonal workload was expensive and frustrating. Not enough resources when busy yet too many resources during slower seasons.

SOLUTION

PABS provides Godfrey with a flexible of onboarding, accounting and tax experts to augment the capacity of the firm and ensure each new engagement is handled with care it deserves.

PABS fully trained resources absorb workload as directed by Godfrey management; generally, staff-level and senior staff-level work is completed for final review by Godfrey managers.

PABS assigned a dedicated team to the Godfrey work. People are fully qualified, experienced, and trained. Processes and procedures are well documented.

Work is planned and assigned to meet Godfrey requirements. PABS Staff is available to meet those needs.

RESULT

Godfrey is now better able to manage its workload achieving on-time delivery of their quality services. The additional resources also allow key members on the Godfrey staff to have better direct interactions with their clients. Godfrey is now able to better plan for business growth and can put attention to new opportunities.

While Godfrey management has final quality review, internal staff is better able to manage workflow and have quality interactions with clients.

Godfrey assigns and receives back work with expected deadlines and quality. Internal staff generally have manageable workloads and stress is reduced. Employee turnover appears to be reduced.

With the workload planned and assigned, Godfrey has the necessary resources during the heavy seasons and has been given the flexibility to reduce the headcount at any time depending on workflow. Headaches and frustration are reduced with this cost-effective solution.



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