

PROJECT MANAGEMENT IS THE KEY WITH PRACTICE CS

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“I’m surprised by just how much can be done with Practice CS,” said Bobby Medlin, CPA, of Tipton, Missouri. The firm opened its headquarters in Tipton in 1987, and later expanded with offices in California, Missouri, and then Lake Ozark, Missouri.

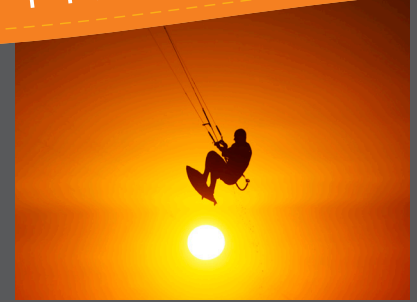
“We used Creative Solutions Practice here and were satisfied, but began talking in the summer of 2009 about a greater need for project management,” Bobby notes. *“We wanted a way to stay current and perform a daily closing of the books. In order to grow, we needed a good control of dates, deadlines and billable time. It was also important to have connectivity between our three offices.”*

The firm, consisting of nine full-time team members and a couple of seasonal employees, purchased Practice CS in the fall of 2009. *“We wanted to implement it immediately, but opted for onsite training first so we could get the most benefit all at once.”*

The staff picked up using the software in just a few days and were pleased at the ease of time entry and billing. There was also an immediate improvement to project management over using spreadsheets. *“Even with the cost of the software and training, we made the investment back almost overnight just by helping capture work we should have been billing for but weren’t,”* Bobby explained. *“It also gave me free time to focus on tasks I couldn’t do before, and work to further increase the business. I use the dashboards to stay up to date on work, staff, and profitability at all times, and it really makes a difference.”*

When it comes time to speak about Practice CS to peers, Bobby is quick to point out that it acts as the central hub of his firm. *“We use Practice CS to monitor all firm workflow and even use it to manage our contacts instead of using a secondary customer relationship manager (CRM) application. Practice CS has been an excellent and welcome addition to our firm.”*

PRACTICE CS



Bobby Medlin, CPA
Owner

