

HOW TO LEVEL THE PLAYING FIELD

Small firm grows year after year thanks to its partnership with Thomson Reuters.

Shirlene Small and Doreena Towner are sisters and CPAs who run **Emerging Business Solutions Group** in Chicago. They consider their relationship with Thomson Reuters critical to their success.

"I think it's one of the factors, if not the primary factor in our success," says Small, the firm's managing partner. "As a small firm, technology helped us level the playing field. Having Thomson Reuters guide us and show us how we can constantly keep moving to the next level has been instrumental."

TECHNOLOGY WITH A PERSONAL TOUCH

Emerging Business Solutions Group uses the entire CS Professional Suite. But it's about more than technology. Small and Towner both credit their Thomson Reuters sales representative, Matt West, for the strength of their relationship.

"We love Matt because he's never felt like a traditional salesperson—he's more of a partner," says Towner. "He knows how we work, he knows our personalities, and he's guided us into technology that would help us achieve what we're trying to do."

The sisters had been in business for about six months and were using UltraTax CS® when they found themselves unable to share files remotely. They called West, and the next day he had them up and running with Virtual Office CS®.

"That was in 2003," says Towner, "and we never looked back."

Small adds that Thomson Reuters has been their technology partner since day one, educating her on websites, domain names, and more, even before Towner had joined the firm.

"Having all that in place means not having to worry about it—you can hit a button on day one and be supported in what you're doing," Small explains. "We love the integration of all our software. And as we've grown over the years, Matt has always been instrumental in letting us know what was coming next."

GAME CHANGERS

West is the one who suggested the duo attend their first Partner Summit in 2009, which is where they learned about GoFileRoom®.

"That was game-changing for us, because of the electronic workflow and everything it offers," says Towner. "That was huge."

Being at the summit was an eye-opener, too. The sisters say they returned to their office full of ideas about next steps.

CS PROFESSIONAL SUITE



EMERGING BUSINESS SOLUTIONS GROUP

Shirlene Small & Doreena Towner, CPAs

FIRM FACTS

BASICS—

Emerging Business Solutions Group provides tax, accounting, assurance, and consulting services to small- and medium-sized businesses. The staff includes a full-time office manager and accountant, and a part-time technology strategist. The firm plans to add another full-time and part-time staff member in early 2014, and regularly makes use of interns.

WEBSITE—

At ebscpas.net, the firm offers a wide range of services including tax tools, a financial guide, and a secure client login created using NetClient CS® Portals.

SOFTWARE—

Emerging Business Solutions Group uses the entire CS Professional Suite®, as well as Mobile CS®. They're also implementing myPay Solutions® on a client-by-client basis.



THOMSON REUTERS™

CS PROFESSIONAL SUITE

TREND WATCHERS

Working with Thomson Reuters—including attending Partner Summits and SYNERGY Users' Conferences—is one way Emerging Business Solutions Group stays a few steps ahead of the curve.

But there's more to it than that. Shirlene Small, CPA, managing partner, and Doreena Towner, CPA, operations partner, read everything they can get their hands on.

"We try to stay abreast of both technical news and industry news," Small says. "That's one thing that's really worked for us: We've always been ahead of trends that are coming."

This includes not only keeping an eye on where the market is going, but paying attention to what the needs of their clients and prospects will be. The sisters anticipate trends so they can be on the lookout for challenges and opportunities, and then develop solutions for their clients based on that.

"We operate with our clients' best interests in mind," Small adds. "That has always worked for us."

"The atmosphere and environment—to be able to share and hear about what everyone else was doing—we thought it was amazing," says Small. "When we don't know what someone's talking about we are never afraid to ask. That's how we learn new things, and the entire community has been open about sharing. It's helped us grow, and we'll continue sharing what we've learned to keep that circle going."

As small business owners who are African American women, Towner and Small have been greatly influenced by role models. They've never felt like being women was a disadvantage, but recognize what a difference their influence can have on others.

"We work with clients in male-dominated industries like construction, and having faced some challenges as minorities we know it's very real," Small says. "We always try to help our clients just in general, but we're in a good position to help them overcome these kinds of obstacles."

SERVICE BREEDS SUCCESS

Emerging Business Solutions Group has grown steadily since 2003, with no end in sight. So what advice do Small and Towner have for firms that hope to achieve the same level of success they have over the last 10 years?

"Always begin with a mindset of service: 'What can I offer that will be of value and benefit to my clients and how can I best serve them?'" Small says. "With that mindset, you'll consistently strive to offer the best solutions—and figure out how to offer even more. Never, ever be complacent."

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