



“Jump in with both feet so your firm can see the difference right away”

One thriving firm shares how Thomson Reuters tax and accounting software helps them provide excellent client service

Meet the firm

Small-town life isn't for everyone. But for those who put people first, it's a perfect fit.

That's just one of the reasons why **Integrity Tax & Accounting** is finding big success and pursuing even bigger dreams in the small town of Bolivar, Missouri. CPAs, owners and twin sisters, **Chelsea Abercrombie** and **Kalena Bruce**, have been Thomson Reuters customers for six years and use a wide range of Thomson Reuters tax and accounting software to manage their firm, increase efficiencies and get powerful results. Specifically, the owners use **Practice CS** and **Practice Forward**, accounting practice management software and services, to streamline their practice and successfully increase profits.

Abercrombie and Bruce grew up on a farm in nearby Stockton and grew to love accounting as they helped with bookkeeping on their family farm. They left to pursue careers in public accounting after graduating from college, but were enticed to return home by the idea of helping friends and neighbors by taking over the practice of a woman who they worked for in college. “It was a door that opened for us,” Bruce says, “and we are so glad that we walked through it.”

Software results were “like a magical experience”

They didn't just walk through that door — they blew it off. Since taking over in 2009, Bruce and Abercrombie have grown the business over 68% to more than 700 clients.

And they have even bigger goals for the future. Part of their plan is to get all of their clients to use the secure online access of Thomson Reuters client portals in order to exchange documentation and communication.

“We are pushing/pulling our clients into the technology world, including client portals,” Bruce says. “We have several clients who think it's the best thing since peanut butter, and then we have lots who just are not there yet. But we have a five-year goal to move everybody to the portal — if we could do that, I think we could increase our client base at least 30%, maybe 50%.”



“We are pushing/pulling our clients into the technology world, including client portals.”

— Kalena Bruce



Firm

Integrity Tax & Accounting

- Chelsea Abercrombie, Owner
- Kalena Bruce, Owner

About

Integrity Tax & Accounting is based in Bolivar, Missouri, has three full-time employees and offers tax, audit, payroll, bookkeeping and tax planning services to individuals and small business clients. The firm serves a range of industries — including construction, farming, welding, state and local government entities, real estate professionals and more.

Website

You can learn more about the firm and the services they offer at integrity-tax.net.

Thomson Reuters Software

Along with Practice CS® and Practice Forward™, the firm uses Checkpoint®, FileCabinet CS®, Fixed Assets CS®, NetClient CS®, PPC's SMART Practice Aids®, Quickfinder® and UltraTax CS®.



THOMSON REUTERS®

Abercrombie found stunning results when the firm started using FileCabinet CS, a document management solution from Thomson Reuters, designed for accountants. “The first time we had someone complete their organizer and upload their documents, and all of that went right into FileCabinet CS, it was like a magical experience,” she says. “If we can get them to scan and upload their documents themselves, that saves us so much time. Even if it just saves us 10 minutes per client, 10 minutes times 700 is a lot of time.” Specifically, two weeks. What would you do with two more weeks of time in a year?

Their Practice CS firm workflow management software also paid for itself in three months or less, Bruce says. Its most important impact was demonstrating to Abercrombie and Bruce their own value. “It helped show how much time we were giving away,” she says. “We weren’t quoting people correctly because we didn’t realize the time we were spending on things.”

The sister CPAs also found success with Practice Forward, a subscription consulting and content offering that helps progressive firms reach their full potential. In just four months, Practice Forward increased the firm’s revenue by \$49,500. “Practice Forward has helped us to bill for those services that we wanted clients to start using, but we couldn’t get them on board because of price,” Abercrombie says. “We knew there was value in that, but Practice Forward helped us to show the client the actual value they’re getting.”

Practice Forward also contributes to Integrity’s capital by helping the firm set up monthly automatic clearinghouse (ACH) payments. “We want our small business clients to be successful, so we were willing to sometimes reduce their annual bill because we understood cash flow was tight for them at that time,” Abercrombie says. “It’s a lot easier for them to pay \$450 a month than it is to pay \$5,400 once a year. ACH has been key for helping us bill what we should.”



Growing with Thomson Reuters software

Abercrombie and Bruce plan to keep growing Integrity and building on their success, using the right technology to make the best decisions for their firm. “Our goal is to hire another CPA to do the auditing and help during tax season,” Bruce says. “For us, that’s a big thing that Thomson Reuters products are helping make possible. One, it’s helping us use our time more wisely. Two, it’s helping us be way more efficient. So that we can do more ourselves so we can build the capital up in order to hire another full-time CPA.”

Excellent client service is also more important than ever when your clients are like family. “Knowing our clients and knowing their history and how the economy has changed for everyone throughout the years — that all helps us to serve them a lot better,” Abercrombie says. “To them, we will always be the Kenney twins, and it’s nice to provide good client service to people who have known you forever.”

Bruce enthusiastically recommends that other tax and accounting professionals give Thomson Reuters software a try. “Thomson Reuters makes sure before they send something out that it’s going to work 100% for you,” she says. “So jump in with both feet so your firm can see the difference right away.”



“The first time we had someone complete their organizer and upload their documents, and all of that went right into FileCabinet CS, it was like a magical experience.”

— Chelsea Abercrombie

To learn more about Thomson Reuters CS Professional Suite®, visit tax.tr.com/cs

