

## Rehmann's right fit

### Efficiency, growth, and balance at a great price: One firm's strategic success with QuickBooks Ledger

Rehmann faced a perennial challenge. At the end of each year, the firm grappled with the inefficiencies of handling low-complexity clients—those who typically surfaced with their financials only at year-end. This scenario not only strained resources but also jeopardized the firm's ability to maintain profitability while balancing work-life pressures.

Enter QuickBooks Ledger—an efficient and affordable option, designed to handle low-complexity clients with ease. Sharon Berman, a Principal at Rehmann, captured its essence by noting, "Here's an opportunity to touch our clients throughout the year instead of once a year and to move that work out of the busy time." QuickBooks Ledger was more than just a remedy for the year-end rush—it transformed Rehmann's workflow into a year-round, seamless process.

The adoption of QuickBooks Ledger has also begun the transition from what used to be a hectic period into smooth, ongoing engagements.

With QuickBooks Ledger, Rehmann effectively minimized the end-of-year rush by creating a more balanced workload and improving work-life balance across the firm.

Rehmann is a professional advisory firm that delivers an extensive array of services including accounting, consulting, tax, HR, technology services, and wealth management.

**Locations:** 17 offices throughout Michigan, Ohio, and Florida

**In business since:** 1941

**Vertical:** Construction, Dealerships, Financial Services, Food & Beverage, Healthcare, Manufacturing, Plastics, Private Equity, Public Sector, Real Estate

**Number of staff:** Over 1,000 associates across 3 states

**Products used:** QuickBooks Ledger, QuickBooks Online, QuickBooks Online Advanced, QuickBooks Payroll, QuickBooks Time, and QuickBooks Payments



“For us, [QuickBooks Ledger] has been a financial win, a time win, an associate work-life balance win, a client experience win. It’s just checked so many boxes for us from a strategic perspective with our clients.”

–Sharon Berman, Principal, Rehmann

## QuickBooks Ledger: The catalyst for Rehmann’s shift from peak stress to peak performance

Clients who only need tax preparation or end-of-year financial reviews pose a unique challenge for advisory firms like Rehmann. Even though they don’t require in-depth accounting and advisory support, they still have important needs that need to be fulfilled. Unfortunately, these low-complexity clients can cause significant seasonal workload spikes. QuickBooks Ledger offered Rehmann an innovative solution that enabled them to spread out their sporadic needs throughout the year and at a low cost of \$10 per month per subscription.\*\*



QuickBooks Ledger revolutionized how Rehmann managed client accounts, enhancing both firm efficiency and client satisfaction:

- **Automated bank feeds**  
Direct connections to bank and credit card feeds minimized manual data entry and ensured accurate, up-to-date transaction records.\*\*
- **Streamlined financial management**  
Automatic reconciliation features transformed cumbersome workflows into efficient, error-reducing processes.
- **Enhanced client insights**  
Provided clients with detailed monthly financial analyses, enabling informed strategic decisions throughout the year.
- **Increased efficiency**  
More operational efficiency to help boost profitability without extending work hours.
- **Strengthened client relationships**  
Reliable financial reporting enhanced trust and client engagement, solidifying Rehmann as a pivotal business partner.

## Low-complexity clients that clicked with QuickBooks Ledger

- ✓ **Service-based businesses**  
Companies offering services rather than goods, requiring basic income and expense tracking
- ✓ **Rental property owners**  
Those that manage financial transactions related to property rentals
- ✓ **Seasonal or infrequent transactions**  
Entities with low or seasonal transaction volumes
- ✓ **Small businesses and solo entrepreneurs**  
Small-scale operations with minimal accounting requirements
- ✓ **Manual or Excel users**  
Those transitioning from manual records or Excel spreadsheets
- ✓ **Clients with multiple small entities**  
Those that manage several smaller businesses under a larger parent group
- ✓ **Trust and estate accounts**  
Trusts with minimal financial reporting and management activity



“We rolled out firm-wide...we just made it available to everybody—the tax group too. We didn’t just keep it for our Finance and Accounting Solutions (CAS) group.”

—Linda Lutsic, Strategic Business Analyst, Rehmann

## Smooth transitions: How Rehmann integrated QuickBooks Ledger into their practice

Implementing QuickBooks Ledger into Rehmann’s operations showcased strategic foresight, planning, and communications. From the outset, Rehmann committed to reducing the number of QuickBooks Desktop licenses by transitioning to a cloud-based system, aligning with their strategy to move towards QuickBooks Online. This shift not only streamlined training and reduced costs but also facilitated the smooth adoption of Ledger’s cloud-based system for their smaller client engagements. Ongoing communications and support of Rehmann team members during transition facilitated in leveraging Ledger effectively, optimizing new workflows for maximum efficiency.

The focus then shifted to client onboarding. Rehmann communicated the advantages of year-round engagement and consistent workflow management, enabling client interaction throughout the year. This strategic integration not only streamlined accounting processes but also underscored Rehmann’s dedication to innovation and superior client service. This shift helped Rehmann maintain both a leading edge in client satisfaction and internal operations.



“We can utilize bank feeds to reduce our time on the job. The technology has made us more efficient and has reduced the amount of time that we’re spending on manual entry, allowing our team to focus more on more value added advisory and consulting services.”

—Linda Lutsic, Strategic Business Analyst, Rehmann

## QuickBooks Ledger unlocked Rehmann’s path to enhanced productivity and satisfaction

Rehmann’s adoption of QuickBooks Ledger has been highly beneficial, both for the firm and its clientele. Through the lens of their experience, it’s evident that QuickBooks Ledger was an effective catalyst for change. The software’s automation capabilities turned tedious manual data entry into a streamlined process, enhancing operational efficiency and enabling the Rehmann team to focus on what they do best—serving their clients.

Recognizing the needs of their low-complexity clients, Rehmann proactively shifted to QuickBooks Ledger to enhance financial management within their firm. This strategic move has enabled these clients to move beyond the traditional end-of-year financial rush. Now, they can access and analyze their financial data throughout the year, which supports smarter decision-making and proactive tax planning. The transition from paper-based systems to a digital platform has streamlined processes and deepened clients’ understanding and involvement in their financial health, fostering a more collaborative partnership with Rehmann.



This shift wasn’t just about saving time but about reimagining how an accounting firm could operate for low-complexity clients. This wasn’t just a win for the firm's bottom line. It was also a victory for its people and their clients.



**“We have happy clients because returns are getting filed on a timely basis, and happy associates because they’re not doing work in February and March that could have been spread out through the year.”**

—Sharon Berman, Principal, Rehmann

Important pricing details and product information:

### **\*\*Features and product information**

**QuickBooks Ledger:** Subscription is only available through the Accountant channel and requires an active subscription to QuickBooks Online Accountant. Your account will automatically be charged monthly until you cancel. Sales tax may be applied where applicable. To cancel your subscription at any time, go to Account & Settings and select “Cancel.” Your cancellation becomes effective at the end of the monthly billing period. You will not receive a pro-rated refund; your access and subscription benefits will continue for the remainder of the billing period. Terms, conditions, pricing, special features, and service and support options subject to change without notice.

**Automated bank feeds:** Requires connection to client's bank and credit card accounts. QuickBooks Online requires a computer with a supported browser (see [System Requirements](#) for a list of supported browsers) and an Internet connection (high-speed recommended). You can connect your client's bank feeds either by inviting them to enter the info in Ledger or using accountant access to your client's bank feed, if applicable.

Terms, conditions, pricing, special features, and service and support options subject to change without notice.