



Ryan Ellis
ELLIS ACCOUNTING

A SOLOPRENEUR WITH EMPLOYEES

Age

51

Position

Owner, small accounting firm

Level of Tech Literacy

Knows more than most

Company Description

Ellis Accounting provides tax, bookkeeping and accounting services to private individuals and businesses.

ANALYTICAL | EVEN-TEMPERED | DISTANT

MOTIVATION

WORK SMARTER, NOT HARDER

Ryan wishes he could clone himself to handle the amount of work that crosses his desk. He'd love to pass along some of his duties but fears a dip in quality.

RETURN ON INVESTMENT

When shopping for a software solution, Ryan does not consider cost first. Instead, he's concerned with the value a solution will provide. He has no capacity for additional employees, so software must meet several needs.

CLIENT SATISFACTION

Ryan knows his clients are why he has a business. He is able to measure client satisfaction with annual retention rates, but he can't personally monitor individual clients. He needs tools to assist with monitoring client status.

BEHAVIORS

STEERS THE SHIP AND SWABS THE DECK

Ryan does everything. His primary role is overseeing the business - managing employees, performing HR duties and reviewing staff projects, while attempting to acquire new business and plan for the future. He handles certain clients himself, and

deals with unavoidable like IT, security, and regulatory compliance.

INVESTIGATION

Before making any decision, Ryan researches heavily. When it comes to software, online reviews usually trigger exploration of a specific solution. He'll attend live demonstrations but prefers a hands-on experience. Deciding factors include how quickly he and his staff will learn using it, if it using it will keeping the firm compliant and secure, and if it appears the software will perform as promised.

GOALS

GROWTH

Ellis Accounting's yearly goal is to increase revenue by a set percentage. The goal for the upcoming year is a 15% increase. To do this, they must provide better service to retain clients while growing client base. Since hiring more employees to take on more clients isn't a sustainable path to growth, they must use other tools to do more with what they have.

BETTER COMMUNICATION

Any software must ease communication between Ryan and his employees, the company and its clients, and between different software solutions (integration).

Ryan uses Rubex to share files with clients and request documents from them. He'd like the process to be intuitive for clients who become guest users

MORE EFFICIENT DOCUMENT MANAGEMENT

Ellis Accounting employees use eFileCabinet every day. At a given time, about 80 percent of documents are digital.

Ellis Accounting uses Optical Character Recognition (OCR) centric tools most often. Documents from their accounting software are imported to Rubex by eFileCabinet. They depend on the application to correctly route documents for their accounts receivable and accounts payable processes, so checks and invoices need to be flawlessly scanned for profile data. Ryan frequently uses the advanced search functions to quickly retrieve documents.

KEY FEATURES

FORM FILL

Using a form fill platform will allow Ryan and his team to collect information from clients quickly and efficiently, with information fields being automatically added to profiles.

AUTOMATION

Ryan should automate certain tasks so that human error won't affect compliance or productivity, and to keep administrative costs down. Tasks related to creating, drafting, filing, and logging paperwork are suited to automation.

GOVERNANCE AND RETENTION TOOLS

Regulations dictate how long firms must keep certain documents. Technology with governance options can maintain control over information subject to such requirements. For example, Ryan can program an automatic action to purge an item from the system once it reaches a specified date.