



turner+cleveland
Certified Public Accountants

The Practice

Public accounting firms haven't been quick to embrace cloud technology and the opportunity the power of the internet allows for real-time client collaboration.

Turner+Cleveland is not one of them. The San Antonio, TX-based practice was offering QuickBooks hosting -- still considered rather cutting-edge overall -- five years ago. Now that more accounting professionals are just starting to explore that shared online access to QuickBooks, Turner+Cleveland is again moving the goal posts for itself and its clients. The entire firm now works exclusively in the cloud.

Turner+Cleveland is a different type of certified public accounting firm. While they provide accounting, tax compliance, estate planning and financial consulting services, they use powerful internet based technology tools to collaborate and communicate with their clients in a real-time, digital, paperless environment. The use of these advance technologies allows the firm to deliver services in the most efficient manner and provide ultimate convenience for their clients. They save their clients time, money and reduce their accounting hassles while focusing on being proactive advisors.

Cloud9 Success Strategies

The biggest challenge that Turner+Cleveland faced as they implemented their Cloud9 technology strategy was, simply, timing- they did it at the beginning of tax season. The practice needed all of its applications -- UltraTax, Microsoft Office, Outlook Exchange, multiple versions of QuickBooks, SmartVault, Bill.com, etc. -- in one place, and it needed those solutions to be available for remote access on laptops, iPhones, iPads as well as office desktop computers.

The firm worked with another major vendor for several years, but what Turner+Cleveland wanted was an all-in-one solution, where everything was in

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~Diana Turner, Managing Partner

the cloud in one location, with no applications running locally on the staff's desktops.

They learned what Cloud9 could do, and they jumped in with both feet, going live with all the firm's software applications at once, as well as transitioning all their hosted QuickBooks clients over to the Cloud9 platform.

"The transition to Cloud9, enabled our staff to have the convenience of having all their tools in one location as well as real-time access to all our clients' data," says Diana Turner, one of the firm's managing partners. Using cloud technology means that the staff spends more time handling the client's real-time accounting issues rather than getting bogged down dealing with getting client backups, handling sync issues with restoring backups and keeping client software updated.

During the transition, while still servicing its normal tax season workflow, the team found itself spending more time with clients on the nuts and bolts stuff (Is the connection with the ISP trouble-free? Is ActiveX running?) than anything else. Extra time had to be spent with each client walking them through the new procedures both in person and on the phone as well as coordinating with the Cloud9 technical support group on their various set-up issues. But Cloud9 Support, says staff member Brandy Gresham, was awesome. There were very short waits for assistance, and everyone was willing to do what they could to help.

Beyond the cohesiveness, time savings and easy accessibility that Cloud9 offered, Turner+Cleveland discovered an unexpected benefit: All staff members had the opportunity to improve their work-life balance by having the choice of working remotely during the expanded hours of a hectic tax season. "It's great to have our workflow so streamlined by having all the staff in the same virtual workspace, regardless of their physical location," says Terry Cleveland, the firm's other managing partner.

So what's next? Getting more of the firm's clients hosted, of course.