

Case Study: Making the Switch to CSI



Accounting & Payroll

More Efficient Process Saves Time & Money

Added Value Printing, Inc., based in Brooklyn Park, MN, are the premier custom PAD printing specialists serving the construction safety gear space.



EXECUTIVE SUMMARY

For years, Added Value Printing was struggling to find the right fit for their small business accounting and payroll needs. Tom Daher, President of AVP, grew frustrated with existing services because he was spending too much time managing accounting and payroll activities, the process was cumbersome, and a lack of real-time data led to reactive financial decisions.

Daher chose to partner with CSI Accounting & Payroll to reduce complexity and to save time and money with a better solution. Now, AVP doesn't have to juggle multiple service providers, the process is simple and efficient, and Daher has the appropriate reports and an expert sounding board for important business decisions.



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The Challenge: Cumbersome Accounting Process Limited Execution

Daher was frustrated with the old process of working with a previous accountant. The constant back-and-forth of downloading and uploading reports for his accountant was cumbersome and time-consuming, taking him away from his operational duties at AVP. The old process also resulted in a lack of real-time data. “We never knew where we were at financially,” says Daher.

He then decided to pull the accounting responsibilities back in-house using part-time bookkeepers and accountants for a stint. But as a small business, AVP didn’t have the space or resources to have them work during regular business hours. That meant Daher had to stay after hours, and managing the inconsistent schedules of part-time employees was troublesome. It wasn’t a good fit.

For payroll processing, AVP used a large payroll service provider. Due to the constant turnover of employees handling his account, more frustrations mounted. Daher was forced to educate a new person regarding payroll information for his business every few months or so. He also grew tired of the constant upselling at every turn.

The Solution: Bundling Accounting and Payroll Services with CSI

“We needed complexity reduction,” says Daher. Rather than continuing to struggle with multiple service providers or part-time employees, AVP brought CSI on board to handle both their accounting and payroll needs.

“The transition was seamless, Brian [owner] and his team met with us to identify our frustrations and to provide solutions moving forward,” says Daher.

The Results: “They treat our business as if it was their own.”

Since partnering with CSI more than three years ago, Daher now has more time to focus on his business and to spend with his family.

“Before CSI,” says Daher, “I spent so much time looking at bank statements, credit card reports, and data in QuickBooks. Now I can go months without looking at any reports knowing that CSI has everything covered. Talk about having the weight of the world off your shoulders.”

In addition to the efficient monthly accounting and payroll services, Daher also appreciates the proactive business advice. “It’s always nice to hear from our accountant. We’re able to use him as a sounding board for big purchases or other business decisions. The best part of the relationship is, he calls us before we need to reach out.”

Working with CSI has been a “blessing in disguise” for Daher and AVP. “Not only do I have more time to grow my small business,” he says, “I’m also saving money by bundling accounting and payroll services together.”

“I fully recommend CSI as a strategic partner for small businesses!”

As a small business owner, are you growing frustrated with your current accounting or payroll situation?

Click this button or email info@csiaccounting.com to schedule a FREE in-person consultation to discuss solutions for your small business >>

