Consero harnesses the power of robust cloud technology to provide full-scale finance and accounting services anywhere in the world.

Bill Klein, President of Consero Global Solutions launched his firm to meet a very big need in both the small and mid-size business and professional advisory firm arenas. That need is: a platform approach to bookkeeping and financial reporting, offering timely and insightful financial information along with back office efficiency and scalability.

“Most businesses are not equipped to handle complex accounting and bookkeeping work on their own,” Klein stated. “We also found that some professional accounting firm leaders didn’t have the time or interest to build out their own back office infrastructure to handle this kind of client work, so we build it for them. This offers accounting professionals a proven solution to support back office work.”

Consero has grown into a powerful force in the outsourced finance accounting services market, and Klein gives a great deal of credit for their success to Bill.com and Intacct.

“Before we transitioned to Bill.com and Intacct, we used disparate solutions ... usually plugging into clients’ existing software. This meant we had no way of standardizing the way we worked, and we kept running into the same issues like process inefficiency and an inability to operate within a paperless system.”

Bill.com and Intacct allowed Klein and his team to build an automated, cost-effective, and completely Cloud-based platform, supporting 24/7 service and access to real-time data. The value to Consero and the firm’s clients has been extensive.

Value across the board

According to Bill Klein, the Consero team researched numerous systems before deciding on Intacct and Bill.com. “It was really no contest. Bill.com and Intacct offered the most sophisticated features at the best price point. Both systems are highly advanced and allowed us to build a standard platform to optimize our services.”

Klein pointed out the stand-out features that drew them to both solutions: Bill.com offered a complete payables solution. “It was the only application that offered full workflow capabilities, including the approval process, and a payment solution on the backend.”

Intacct offered far and away the most robust reporting capabilities. “Intacct allowed us to move away from QuickBooks® and the manual processes that come with building custom reports. Intacct had everything we needed: scalability, high-end reporting that our clients require and it was Cloud-based.”
Bill.com and Intacct served as the core of Consero’s platform. Over time, the firm added online document management and expense management applications. It also developed a proprietary interface — offering clients a single space to review all of their financial information and data.

“Our goal was to create unity,” Klein explained. “Using a standardized platform, we’ve certainly increased internal efficiencies. But more importantly, we are able to offer a great deal of value to our clients. We not only handle daily processing work, but with deep reporting capabilities and real-team access to data, we can also support clients with in-depth financial insight that drives smarter business decisions and better positions clients for success.”

In addition, Consero’s platform offers clients a single sign-on and one convenient location to access their information at anytime and from anywhere. The value of this level of convenience, according to Klein, “...is immeasurable.”

Final words

Klein is not shy about expressing his opinion regarding those who have yet to adopt the Cloud. “Providers who have not transitioned to a digital environment are missing the boat. The efficiency gains alone are reason enough to make the move ... not to mention the exceptional level of service you can offer clients.”

Klein shared that they picked up one client because the previous service provider was out of date. “This client is in the technology niche, but he did not get high-tech service from his accounting professional — it was more like no-tech service. For example, he [accountant] delivered paychecks manually for signature and had no way of delivering financials online. We showed the client how he would pay bills through Bill.com, and he immediately realized how much more productive and simple it would be working with Consero.”

Contact us today!
855.855.5CPA

Learn more at:
CPA.com