When Javier Goldin left his executive position with a national non-profit to launch his own firm, he knew it wouldn't be easy. Located in the greater Washington D.C. area, he had entered a market saturated with accounting practices – tasking him to figure out how to set his firm apart from the pack.

“The transition to opening my own firm was not taken lightly. It can be hard to move out of your comfort zone, but I wanted the challenge. I knew I was moving into a very competitive D.C. market and would have to find a way to differentiate my firm and my services,” Goldin stated.

The first year in business, Goldin reported that his firm was already profitable, but he had yet to differentiate his business from all the others. Into his third year he discovered how to overcome this challenge.

“It was really when I came into contact with the AICPA and CPA.com that my firm took a positive turn. When I saw the potential to marry technology with CPA services, it clicked that this was the answer to present my firm in a different way,” Goldin explained.

His success, in great part, came from a deep understanding of the changes taking place in the profession – specifically in terms of technology. As a true visionary, Goldin expressed the need to be open and accepting that technology is changing at breakneck speeds. He also stated that if firms are to stay relevant, they must stay in front of these changes or be left behind.

“You have to stay up-to-date on new technologies and you have to move very quickly. The concept of marrying CPA services with technology to offer best-of-breed services to clients really forces us to be open to change at all times.”

Linking advanced technology with top-tier services

In his effort to stay ahead of the technology curve and link the best applications together to serve his clients, Goldin works hard to stay informed. As such, he identified Bill.com and Intacct as two leading solutions that could support his firm and his clients.

“We are more than number-crunchers today; we are advisors. And that means we have to do the work to identify technology and integrate it into our services to offer a better platform for our clients and help them grow.”

Goldin went on to explain that in the area of payables and receivables, Bill.com is the premier solution, and that Intacct has also been a game changer. “The dashboard in Intacct never fails to impress our clients; the ability to drill into the data and analyze the financial health of a business on-demand is exceptionally valuable.”

Bill.com and Intacct offer highly sophisticated technology that is scalable for any size client. According to Goldin, these solutions are also “reasonably priced and very user friendly.”
To hit home just how valuable technology has been to his clients, Goldin offered a specific client example: “One of our non-profit clients was explaining to me how he had been using the popular hosted accounting program QuickBooks® to run his business. The client explained that while the solution was robust, it was slow in accessing data, and that was very frustrating to him. The client called me to say that he wanted to move to QuickBooks Online. He thought that these solutions were his only two options.”

Of course, Goldin knew better, so he promptly updated his client on the power and agility of Intacct. “I explained the solution’s detailed dashboards, graphics, multiple dimensions, rapid access to data because it’s cloud-based, the unlimited storage, and the fact that we [the firm] could provide it to the client at a very reasonable cost.”

This example illustrates the options today’s progressive firms can offer their clients in terms of technology. Goldin asserted that solutions like Intacct open a whole new world of options to address the unique needs of certain clients – like those within the non-profit niche who are challenged with exceptionally complex accounting structures.

Final words

The marriage of accounting expertise to today’s advanced technologies has proven a perfect match. Goldin’s firm has grown substantially since its launch and “has grown more than 50 percent in the last year alone,” Goldin shared.

Technology has allowed him to build an automated, streamlined internal infrastructure that enables staff to serve clients in a highly efficient manner. With on-demand access to data in the cloud, the firm has transformed into so much more than a provider of accounting work. Goldin’s team now provides clients with true advisory services.

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