

Beneficial Bookkeeping, Inc.

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TINA TINTLE
Owner

Core Business

Full-charge bookkeeping and QuickBooks support firm

Services

Bookkeeping and QuickBooks set up, training, and consulting

Homebase

Huntington Beach, CA

Business Launch

April 2003

Employees

Sole practitioner

Technology of Choice

SmartVault, QuickBooks, Microsoft Outlook

A sole practitioner's foray into the land of client portals

Tina Tintle knew that there would be a lot of work involved to open her own firm, including identifying and implementing the right technology. SmartVault offered an exceptionally easy-to-use document management solution and all the benefits that come with portals.

The Background: *After hitting the glass ceiling at a previous firm, Tina Tintle launched her own practice, building a technology infrastructure that allowed her to run her firm her way... efficiently.*

Tina Tintle, owner of Beneficial Bookkeeping Inc., has been in the business of helping clients thrive in their given industry by providing accurate and timely financial insight. Prior to opening her own firm, she experienced the proverbial glass ceiling, which prompted her to take the plunge and launch her own practice.

“There was that point when I realized I couldn’t advance any further within my previous employer’s firm. I talked to my husband about going out on my own and he told me to go for it,” Tintle explained.

And ‘go for it’ she did. In 2003, Tintle started Beneficial Bookkeeping and has grown her client base steadily.

“I started from scratch. I had to work hard at generating new business leads,” Tintle recalled. “I also had to implement the right technology to support efficient workflow.”

As business grew, Tintle knew that she had to build an infrastructure that enabled her to work efficiently internally and with her clients.

After attending the Sleeter Conference in 2011, she discovered SmartVault and realized the true value of a Cloud solution—and more specifically, client portals.

Client portals for everyone

Implementation of SmartVault marked Tintle’s entrance into the land of the great and mighty client portal.

Tintle asserted that the technology allows her to look bigger than she is. “I can offer the same advanced online service as the big guys, but still maintain that close, personal small firm relationship with my clients.”

The client portal option in SmartVault supports seamless and secure delivery of client documents, which is how clients want it.

Tintle acknowledged that this is a big deal. “Clients expect this level of convenience. That’s what they’re used to... portals are everywhere and offer real convenience. And even though I’m a sole practitioner, I can offer it to them as easily as a much bigger firm. SmartVault really levels the playing field.”

Operating her own firm, Tintle has a lot on her plate, so simplifying internal firm processes was also a must.

“I not only needed to offer convenience to my clients, but I also needed to improve efficiency in my own office. Again, that’s where portal technology comes in.”

According to Tintle, SmartVault fully supports a seamless, efficient workflow. “It’s as simple as uploading documents with the click of the mouse. My clients receive an email with a link to their documents embedded and then click the link to access docs within their individual client portals. I operate at a very high productivity level. SmartVault has also helped bolster my professional image.

Tintle also mentioned that SmartVault portals have drastically reduced the need for faxing and snail mail. “Most of my clients are using the portal. We still have some hold-outs, but the reduction in paper is notable—as is the time savings.”

The ease of implementation

Tintle’s transition to SmartVault took little more than a short training session.

“There was no interruption in business whatsoever,” Tintle explained. “I handed over the job of branding my SmartVault portal to my web developer, which took little to no time to do. Then I participated in a half-hour phone training session to get up and running. That is literally all it took to launch SmartVault.”

Ease of implementation and use, according to Tina Tintle, rank high on the value scale. “Because the solution is so simple, it saves me so much time, and my time is valuable.”

While she admitted that all her clients are not using SmartVault to its full capacity, they are fully enjoying the convenience factor offered through client portals. “Client’s love that their work is not interrupted. They simply click a link to access prepared documents...no phone call or faxing required. As I move forward, I plan to transition more of my clients into using SmartVault to upload their source documents as well.”

Overall, SmartVault has helped Tintle run a smooth and streamlined operation. “SmartVault has also helped bolster my professional image... it makes my firm look exceptionally tech savvy and progressive, allowing me to offer advanced online services like the big firms do. The technology makes all the difference!”