

Blumer & Associates

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JASON BLUMER
Chief Innovation Officer

Core Business

Full-service accounting firm, specializing in business processes, strategy & cloud computing consulting

Services

CoreCloud technology consulting, accounting, tax, online payroll, and business consulting

Homebase

Greenville, SC

Business Launch

1997

Employees

3 full-time, 3 part-time

Technology of Choice

SmartVault, QuickBooks, Xero, ScanSnap

Jason Blumer explains the core requirement in building the ideal workflow system—choice

With a firm belief that innovation rules supreme, Blumer dismissed integrated accounting suites to develop his own network of technologies

The Background: *Blumer knew that he wanted to develop a streamlined, paperless office in his firm, but leading suites were far too expensive and didn't allow him to pick the individual applications that worked best for him.*

No one understands the importance of “choice” more than Jason Blumer. Over the years, he has identified several advanced cloud applications and services that help keep his firm all-digital and operating at peak efficiency.

“I’m not an integrated suite kind of guy,” Blumer explained. “First of all, my small firm simply couldn’t afford the license fees. Second, I like to have control over selecting each piece that goes into our system. There are so many individual applications out there that blow away the software in the larger suites.”

In 2009, Blumer attended a conference where the keynote speaker touted the value of cloud computing. Blumer was hooked from that point on and knew that if he was going to elevate his firm to a new level of efficiency, advanced technology was the answer.

“I started by moving our client accounting online. We transitioned to the hosted version of QuickBooks, realizing that it benefited the client as much as our staff. Clients can enter data online any time and from anywhere, and we can access that data round the clock.”

There was no going back after that. Blumer had his sights set on best-of-breed cloud applications, which is why he selected SmartVault.

“My staff loves SmartVault because it offers complete online document management. Not to mention it’s so incredibly intuitive for staff and clients. This is the kind of innovation I require in my firm and why I insist on having a choice,” Blumer exclaimed.

What the Future Holds

Blumer believes that cloud technologies are the future...beyond just use in the accounting firm.

Jason Blumer is blown away by the power and flexibility of the cloud applications he is currently using in his firm, so he believes that accountants should be leading clients to these solutions as well.

"Just look at SmartVault. It's our filing cabinet in the sky. It allows us to exchange documents with our clients any time via secure and super easy to use portals," Blumer explained. "But it's so much more than that. SmartVault provides a solution that works within both environments—our firm and our clients' offices. You can't do this with traditional accounting software."

Blumer is not against using accounting-specific applications, but he believes that using solutions that can also be integrated in the client's work space is critical.

"If we are using the same apps as our clients, the relationship grows stronger because we can also consult on technology and process. That's why we use SmartVault for document management—not a traditional filing solution designed only with the accounting firm in mind. Cloud applications are open to everyone."

Blumer advocates this type of consulting. Beyond tax planning and accounting work, small businesses need education in the areas of technology and strategy. He believes this is a major disconnect in the profession.

"This is what we should be doing for our clients," Blumer stated. "I really believe firms are missing the boat if they are not helping clients enhance their internal processes. That's why we offer CoreCloud Technology and Strategy consulting as primary services. We introduce clients to the technologies that we are using ourselves and explain the immense value they offer. So far, our clients love SmartVault!"

Top SmartVault Value Props

Blumer offers his top-five list of the value SmartVault provides.

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Blumer's top-five list includes:

1. **Lightning Quick Deployment of Enhancements:** true cloud-based solutions offer much faster release of system upgrades.
2. **Significant Cost-Savings:** no up-front costs or elevated license fees make SmartVault affordable to the masses.
3. **Exceptionally Convenient, Intuitive, and Secure Document Management:** SmartVault portals support 24/7 delivery of client documents and a secure forum for file exchange. Ease of use is also a huge plus because there's no training required.
4. **Seamless Integration with QuickBooks:** supports a paperless online client accounting process.
5. **Smart Launch of SDK (Software Developer's Kit):** opening up the SmartVault platform to other application developers promotes integration across an unlimited number of other powerful cloud applications.