

ACCOUNTANTS

Penniwise Accounting & Tax Services

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PENNI ECHOLS
Owner

Core Business

Full-charge bookkeeping and payroll company

Services

Bookkeeping, payroll, HR, financial planning, tax, QuickBooks training, and business consulting

Homebase

Tustin, CA

Business Launch

2009

Employees

1 Full-time, 2 Part-time

Technology of Choice

SmartVault, QuickBooks

A #1 Hit with Clients

Firm owner sings the praises of SmartVault for helping her provide a rich client experience every time

Penni Echols, owner of Penniwise Accounting and Tax Services, has been a loyal SmartVault user for the past three years...but not before testing the solution thoroughly. Prior to purchase, Echols evaluated another document management and storage system alongside SmartVault — comparing features and functionality. Echols was clear that she needed the right system in place to best serve her clients.

“SmartVault came out as the clear winner,” she explained. “I found the system to be very easy to use, but more importantly, it was easy for my clients. I found that the majority of clients were up and running almost immediately.”

Like most progressive firm owners, Echols is dedicated to providing service that offers her clients ultimate convenience. SmartVault is integral to this mission, offering 24/7 access to files and supporting ease of document exchange via the SmartVault Portal.

At the core of Echols model is providing clients with a rich experience at every touch point with her firm. With SmartVault, she is more than meeting this need.

Saving everyone valuable time...

“I can’t begin to quantify just how valuable SmartVault has been to my firm,” Echols stated. “I do know that I’ve saved hours upon hours of time by eliminating onsite visits. I used to drive to many client offices to pick up files. I would then bring them back to my office to scan, and then run source documents back to the client’s office. It was a lot of drive time.”

While Echols did a fair amount of praising in terms of how much time SmartVault has saved her firm, true to form, she quickly reverted her attention back to her clients. “SmartVault saves my clients a lot of time, and that’s what’s most important to me.”

Focused on two distinct niche markets, interior design and construction, Penni Echols was able to clarify the unique value to these clients.

“My interior designers are very creative...they don’t want to take the time to learn new technology...with SmartVault, these clients are up and running quickly,” she explained. “With my construction clients, these guys are out in the field all day, so they rely on SmartVault to upload documents to me after hours, instead of waiting until the next business day for me to do a pick up. Real time document upload means I get the documents sooner and can quickly turn around cost reports, which are critical to these clients.”

SmartVault has saved Echols so much time she admits that, periodically, she sits and thinks: “Am I supposed to be doing something right now? Should I be running to a client’s office?” After a few seconds, it hits her that she’s not missing anything; she just has more time due to the efficiency gains from using SmartVault.

Final words...

Echols praised SmartVault not only for significantly improving firm operations and the client process, but also for the “excellent support” she received both during implementation and through to today.

“A lot of companies don’t continue to provide excellent support after the sale of the product. This could not be less true of SmartVault, however. The support I received from the beginning has been superior. I remember getting personalized support from my account rep to help set up my file structure and transfer all my files. And to this day, I get that same level of personal attention with very fast response time.”

And it’s not just about getting expert support. Echols also stated, “I not only get the benefit of an experienced support person who knows the product inside and out, but everyone at SmartVault is exceptionally friendly, and that is very valuable to me.”

With her clients beyond happy with SmartVault, and her firm running at peak efficiency, Penni Echols is well positioned for business success. Future plans include continued growth within her prime niche markets and beyond. With SmartVault at the core of her technology infrastructure, there is no stopping Penni Echols!