

Dext

Case Study

Louis Buhrmann
Accounting Services

Increasing productivity and
empowering advisory with Dext

25% Time Savings

= More clients, more revenue



If you take Dext and somebody looks at that, and they want it, you know then that they are already the type of client you want.”



Louis Buhrmann
CPA, CA
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Accounting Services

Dext helped Louis Buhrmann Accounting Services, a Nova Scotia-based Bookkeeping firm, reduce paper trails and empower their advisory services to increase their value.



About

Louis Buhrmann is the owner and manager of a Nova Scotia Based bookkeeping firm that uses a versatile library of cloud accounting tools, which helps Louis create optimized workflows. He saves time for both his clients and team while not reducing the level of service they expect.

Louis began his career as an accountant at KPMG, where he worked at all accounting levels. He enjoys working with small businesses and embraces the opportunity to impact local communities positively.

Leaning on his diverse professional history, Louis brings a unique perspective to the bookkeeping industry.



Challenge

Before Dext, Louis struggled with paper trails and spent time sorting through and tracking down receipts for his clients. Entering into 2020 and with the onset of the COVID 19 pandemic, he had to find a solution that would allow him to serve his current clients while also leaving room for easy client onboarding for business growth.

With Louis's tech-ready mindset, he began seeking out the tools he thought would best allow him to serve his clients. "I knew that online is the future. And I was continuously pushing what online tools can offer me," said Louis, using this as a central point guiding the way his business runs from the core. Louis understood that online accounting provided an opportunity to increase the level of service he was able to offer to his clients.

Louis implemented a more robust tech stack and, in doing so, attracted more tech-savvy clients. He could generate a pool of clients and successfully onboard them with a higher velocity and success rate.

"If you take Dext and somebody looks at that, and they are interested, then you know that they are the the type of client you wan." Instead of focusing on an industry or other business types, Louis focused more on the client's tech



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Solution

Dext empowered Louis to build a workflow that allowed him to onboard more customers and create even more efficiencies within his firm. He was able to focus less on manual data entry and transition towards providing advisory as a service. Louis was able to leverage the Automation rules within the platform to their fullest extent.

Through Louis spearheading this digital effort, Dext enabled him to step back and function more as a practitioner and advisor for his clients.

Louis was able to harness Quickbooks and Dext's power to deliver a package offering. Being able to simplify and train his clients, Louis was also able to develop an app to automate the review of the already automated bookkeeping work performed by Dext. The app further checks for potential sales tax underclaims, potential incorrect bookkeeping classification, and unreconciled accounts. Louis was able to help his clients identify common areas or transactions to enhance the supplier rules to optimize the process through the application further.



Impact

Using Dext to help automate his client's accounting journey, Louis has cut the time he spends tracking down receipts and completing low-impact tasks by 25% per client per week.

With more time in his schedule, Louis is providing additional advisory services for his clients and expanding his service options. Through this expansion of services and increased efficiency, his firm continually enhances the value he provides to his client's firms.

As he looks towards the future, Louis is excited at the prospect of continuing to develop his firm. With the newly found freedom he has received from the time reduced on finding client documents, Louis can spend more time helping his clients and building relationships that allow him to dive deeper and provide better insights that drive growth at his client's firms.

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advisory?**

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