



## **CONQUER** BUSY SEASON

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**How we helped a top CPA firm based in Dallas  
increase revenue and profitability while meeting all  
of their client deadlines**

## SUMMARY

Like most accounting firms across the country, our client dreaded the onslaught of busy season. Long hours, low employee morale, and unmet deadlines were no longer a permissible option. As a growing firm, they sought to take advantage of new opportunities with prospective clients, but were constrained by increasing demands and growing hiring needs for top CPAs within a tight labor market. Their goal was to systematically overcome the challenges of their busiest time of the year: meet all client demands and pursue new opportunities for increased revenue, all while reducing expenses.

Here's how we met the challenge of their growing workload and provided a long-term solution to exceed client expectations, expand profitability, and conquer busy season.



## OUR ROLE

Providing fast, contract-based talent solutions in the form of a nation-wide talent pool of experienced freelance CPAs; vetting qualified public accounting professionals and matching the right skills and experience with the needs and culture of the firm.

## CHALLENGE

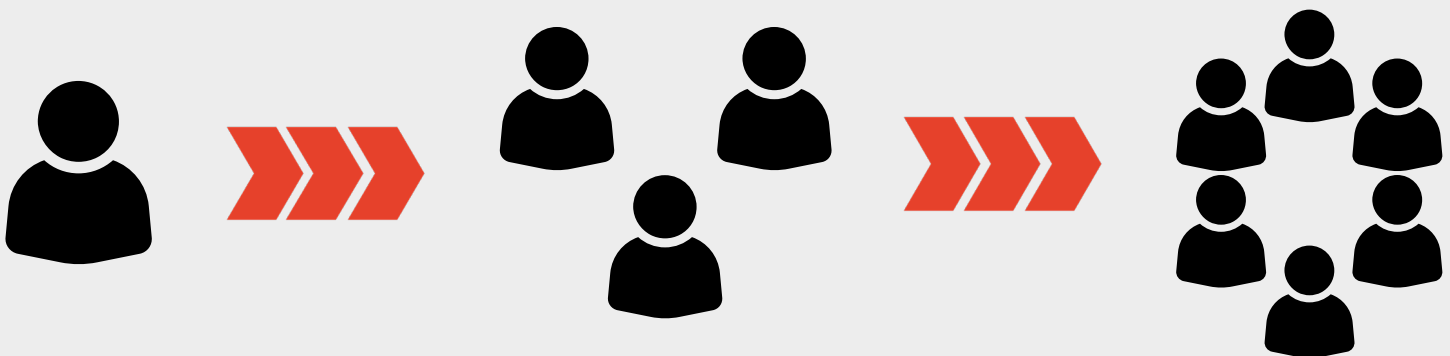


Busy season is a challenge for any firm, small or large. Our client, however, was facing an even bigger challenge: growth. Not only were they navigating steep customer expectations, but they were growing. And rapidly.

This fast-paced growth left the partners in a difficult position. They were uncovering endless opportunities with current and prospective clients, but their ability to propose solutions was limited due to the time and effort to grow their existing team. They lacked the time and resources required to search for, interview, and hire a full-time employee. Yet, they needed additional capacity to disperse the workload—or run the risk of missing out on growth opportunities.

Outsourcing the extra work to contracting companies and part-time preparers was out of the question. Quality control was a significant factor for the growing firm, and these agencies failed to identify and present them with the right candidates: CPAs with previous public accounting experience at a reputable firm..

Outsourcing the work of hiring a full-time employee was also an ineffective solution. The challenges of finding and hiring full-time CPAs aside, the extra overhead during the slow season associated with multiple hires would decrease the firm's profitability and open the firm up to macroeconomic market risks in the event of a recession.



## ACTION

***“We provided a solution that would check all the boxes... and then some.”***

We provided a solution that would tick all the boxes...and then some. After an initial conference with our client, they decided to hire one contractor to help them navigate their current workload. We provided a list of vetted freelancers who were qualified and a good fit for their culture, software, and client base.

The firm began conducting interviews with our candidates and quickly realized that Beech Valley's standards for quality were much higher than they originally expected. Our client requested help with four more open positions, which we were able to quickly and easily fill.



## OUTCOME



The busy season never looked better.

The firm added new clients left and right, while still meeting the demands of existing clients. The partners at the firm were also able to keep workloads manageable as work was evenly distributed across their existing team and newly-added freelance talent.

Not only were the freelancers a perfect match for their systems and solutions—each freelancer had significant experience preparing and reviewing small business returns in ProSeries, the firm's software of choice—their work ethic and quality brought needed support to their existing staff. Our client described working with us as “the absolute best busy season ever experienced at the firm.”

Profitability and revenue increased. All deadlines were met. Both clients and employees were satisfied. And did we mention that our client saved money while growing their top line?

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The firm estimated an annual cost savings of \$200,000, thanks to their ability to flex up their resource capabilities during the busiest time of year, and then flex back down after the busy season. Their successes have resulted in a continuing partnership with Beech Valley.

What do long-term solutions look like in a short-term, contract economy? We've established a recurring relationship with their favorite contractors to provide ongoing support for the next busy season, and beyond.

IN THE WORDS OF OUR CLIENT

★★★★★ *"We can't thank them enough for their help. Working with Beech Valley has been a really positive experience for us that led to the best busy season ever experienced by our firm. We consider them to be an integral part of our growth strategy going forward."*



**BEECH VALLEY**  
SOLUTIONS

## INTERESTED IN LEARNING MORE?

Reach out to **[contact@beechvalley.com](mailto:contact@beechvalley.com)** or visit **[BeechValley.com](https://BeechValley.com)** for more ways to flex up during busy season.

We look forward to being in touch.  
- Managing Directors, Brad Hughes and Josh Tarica