

CPA Firm Sees Dramatic Increase in Billable Hours

New VoIP phone system pays for itself in less than six months

Firm Overview

Gifford & Cox, LLC is a firm of Certified Public Accountants and Consultants with locations in North Platte, McCook, Ogallala and Imperial Nebraska. The firm's services are provided to closely held and family owned businesses, include tax planning and preparation, accounting and auditing. Principles Kyle Gifford and Ty Cox are active in community organizations as well as industry associations such as the Boomer Technology Circles.

Challenge & Objectives

Gifford & Cox maintains offices in four cities during tax season. During the rest of the year, services are provided from two offices. With traditional phone systems in each location, adapting to the seasonal increase and decrease in staff was difficult and expensive to maintain.

Because accountants frequently need to work from another office based on the volume of work or to meet with local clients, the legacy phone systems made it difficult for staff and clients to communicate. These limitations directly impacted customer satisfaction as well as the amount of time accountants were able to spend with clients and therefore billable hours.

The firm began investigating phone system options. In upgrading, the firm hoped to:

- **Communicate transparently across offices as if they were in the same building**
- **Make it easy for clients to reach employees regardless of their location**
- **Allow administrative staff in all locations to answer incoming phone calls for any location**
- **Monitor and report on phone calls between clients and staff to accurately capture billable hours**

Technical Requirements

The proposals Gifford & Cox received were for traditional phone systems – essentially newer versions of what they already had. While attending an accounting industry conference, firm principle Kyle Gifford described the challenge to Gary Boomer of Boomer Consulting, founder of Boomer Technology Circles. “Gary suggested we set up a meeting with Network Innovations.” said Gifford. “Boomer Consulting had already deployed an AltiGen VoIP phone system, and he thought they could help us solve these issues.” Brian Gregory of Network Innovations worked with Gifford & Cox to deliver a solution that:

- **Integrated all four cities by routing calls across the company's data network**
- **Eliminated unproductive time spent finding employees since staff could now log into any phone at any location and instantly be reached and access voice mail**
- **Utilized call reporting to easily track and bill time spent with clients via the phone**
- **Integrated high quality call conferencing to bridge multiple people on a call**

AltiGen Communications Case Study

Boomer Technology Circle Member - Gifford & Cox, LLC



Solution

The AltiGen software solution is installed at the Gifford & Cox office in North Platte with point-to-point T1 connectivity to their McCook office. Their additional offices are connected to the AltiGen platform via VPN over DSL. AltiGen Voice over IP telephones are installed at each of the firm's offices.



Because the AltiGen solution is a Microsoft based platform, the firm also leveraged AltiGen's integration with Microsoft Outlook to dial directly from a client contact record.

"The AltiGen solution is the ideal architecture for multi-location organizations like Gifford & Cox," noted Network Innovations' Brian Gregory. "The AltiGen platform provides seamless connectivity and a single system view for all of the firm's employees, irrespective of where they are working, or how the offices are inter-connected."

Results

"In addition to achieving our goal of unifying communications across locations, we utilized AltiGen's call logging capabilities to increase our documented billable hours," noted Gifford & Cox Partner, Kyle Gifford. "I am personally capturing 15-30 minutes of billable time each day that without a doubt I've been missing over the years. As a result all of our top people have been to significantly increase billable hours. From this benefit alone, we have been able to recoup our investment in the AltiGen platform in six months."

"The AltiGen system has enabled us to increase productivity while making it much easier for our clients to work with us. We now balance workload and call flow across our offices. With the addition of AltiGen's integrated conference calling capabilities, everyone associated with Gifford & Cox has benefited from the AltiGen solutions, especially our clients."

Summary of Benefits

- AltiGen platform provides a single, unified system across all locations
- Integrated call logging capabilities enables firm to more effectively document and therefore dramatically increase billable hours
- Increased productivity frees advisors to spend more time helping clients
- Integrated conference calling improves productivity and service levels
- Outlook enabled "click to dial" feature increases productivity for both administrative staff and accounting professionals

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