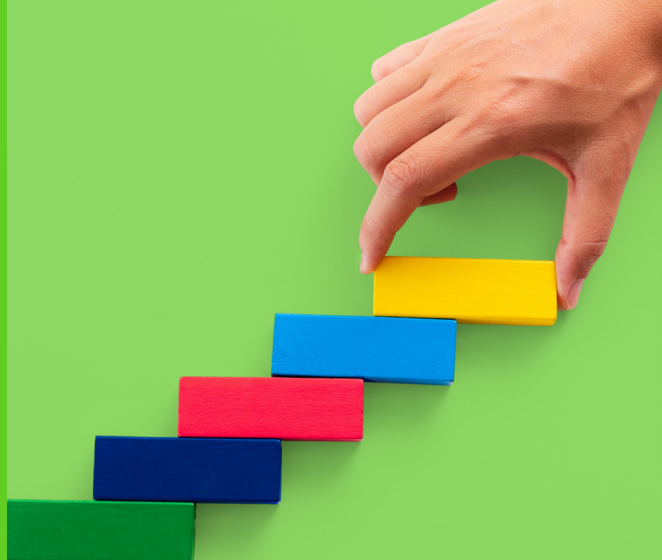# #FloQast

Into a New League: How FloQast Gave Abilene West the Confidence to Win Bigger Accounts

Patricia Gay
Founder, Managing Director, Abilene West

Jolie Trogdon
Client Accounting Manager Abilene West

A WEST

INDUSTRY
Consulting Accounting Services

LOCATION
Sebastopol, CA

COMPANY SIZE
10 employees

STAGE
Private

OBJECTIVE
Standardize and improve workflows with a transparent system that builds confidence among clients and accountants alike

WHY FLOQAST
- An intuitive, easy-to-use platform made by accountants for accountants
- Leadership can easily track the progress of every project
- A well-designed interface boosts efficiencies
- Clients are impressed by the platform and its capabilities
- The opportunity to partner with a company responsive to client needs

RESULTS
- Revenue significantly increased since FloQast implementation
- Streamlined processes, including audit preparation, with improved accuracy
- Confidence to take on larger clients and manage heavier workloads

Abilene West is a small but mighty CAS firm based in California that prides itself on providing high-end services to small and medium-sized businesses while remaining agile and flexible around client needs.

Providing sophisticated services requires streamlined processes. Managing Director **Patricia Gay** and her team, including Client Accounting Manager **Jolie Trogdon**, thought they were doing just fine until an interview with a prospective client led them to believe they could do more. The client's new CFO came from a firm that had recently implemented FloQast—had she heard of it?

Abilene won the account, and Gay resolved to look into FloQast. They discovered a platform that Trogdon says was "built by accountants for accountants."

Asana Just Wasn't Cutting It

Before implementing FloQast, Abilene used Asana for their workflow and Windows Explorer for file storage. In FloQast, Gay saw that "everything is organized the way accountants are used to seeing it." The firm had spent considerable time and resources to implement Asana, yet it never resonated with the team like FloQast immediately did. She now sees the problem: "Asana wasn't built for me."

Completing reviews with Asana was always tricky, and it was difficult for Gay to know exactly where employees were in their work. This uncertainty created problems when it came time to close and reconcile accounts every month. They weren't always sure whether the figures in a work paper were up to date, so they occasionally missed closing an account, ultimately creating more work for themselves.

Reviewing work papers within Asana was a manual process, where people would check notes against separate Excel files. And because there was no standardization in documentation across clients, it sometimes took weeks to prepare papers for auditors. The lack of standardization created further problems for onboarding new hires.

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> ## I cannot imagine working without FloQast anymore. We want to scale and grow, and this will allow us to do that.
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> **PATRICIA GAY,** Founder, Managing Director

"At the time, there was nothing like FloQast," Gay says. So when she saw the platform in action, "I was sold."

When it came to implementing the solution, "We had no idea where to start," Trogdon admits, "but the FloQast team helped us through every step of the way."`

Everything in Its Right Place

The team at Abilene West is in a very different position today than before adopting FloQast.

"Anytime I go into FloQast, I can see who's doing what and how far along they are," Gay says. "I can follow up with people, and I know what I've reviewed because I can check it off."

FloQast's incorporated review notes make the review process much easier, as the notes are incorporated into the document. Documentation is standardized across clients, meaning they always know where to find the information they need, and preparing for audits is a simple matter of "copy and paste." That consistency carries through to the monthly checklist, which results in greater accuracy at the month close. It also makes training and onboarding much simpler.

"There's something very appealing in the way they've set it up that makes it just fun," Trogdon says. Something as simple as having tasks turn green upon completion creates a better user experience. FloQast Analytics also lets users track how they beat deadlines. "There's all sorts of little things they've built

into FloQast that add that motivating factor," Trogdon says, adding that the simple design means accountants can start using FloQast quickly.

Finding Community with a Partner Who Gets It

For Gay and Trogdon, the successful implementation of FloQast is because the software company profoundly understands the accounting profession—enough to provide light and fun content in addition to their primary platform offering. Their "PBC" YouTube series is a hit with users, who frequently share episodes with their peers. Gay, who has a background in psychology and coaching, says it's "remarkable" for a company to do what they have done. "What they've been able to tap into is giving accountants a sense that 'We see you, we understand you.'"

The sense of accounting camaraderie carries through to FloQademy, their learning portal, which enables FloQast customers to further their knowledge and have some fun— while earning free CPE credits, too.

Trogdon is impressed the company doesn't stop moving: "They are continually adding and improving features and listening to customer feedback," she says. Abilene is a beta tester for several upcoming features, ensuring they have a voice in future product development. FloQast makes even a small firm feel important, which goes a long way.

"Not only has it streamlined processes, increased profitability and reduced mistakes, but it feels like a real partnership," Trogdon says.

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> **JOLIE TROGDON**, Client Accounting Manager

#FloQast

The Confidence to Increase Revenue

Gay notes that Abilene has significantly increased its revenue since implementing FloQast, partly because they are much more capable of taking on heavier workloads. "There's a relief in knowing you're staying on top of things," she says. "It breeds confidence, giving you the certainty that you are managing your team well." She says that confidence puts them in another league than other firms, and it's a factor in securing larger clients, including a recent account with 15 companies under its umbrella.

In addition to the firm's flexibility and agility, FloQast has become one of Abilene's selling points. Clients are impressed by the platform and what the team at Abilene West can do with it. "We're not just here to churn their numbers," Gay says, "We really are here to help them succeed."

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> **It gives you confidence in going to much larger clients and saying, 'We can handle you.' FloQast puts us in another league.**
>
> **PATRICIA GAY**, Founder, Managing Director

About FloQast

FloQast delivers workflow automation software enabling organizations to operationalize accounting excellence. Trusted by more than 1,900 accounting teams — including Twilio, Los Angeles Lakers, Zoom, and Snowflake — FloQast was built by accountants, for accountants to enhance the way accounting teams work. FloQast enables customers to streamline processes such as automated reconciliations, documentation requests, and other workflows that impact the month-end Close, financial reporting, and payroll, and is consistently rated #1 across all user review sites.

Learn more at **www.floqast.com**.

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