#FloQast

Rehmann Optimizes Month-End Close for 1,000 Plus CAS Clients **with FloQast**

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Troy, Mich.-based Rehmann provides client accounting services (CAS) to thousands of businesses nationwide and depends on FloQast to standardize workflows, organize client deliverables, and streamline the month-end Close. With FloQast, Rehmann has given its regional offices a common platform for not just Closing, but also, enabling easier workload sharing, improving communications, and enhancing overall visibility into team productivity and progress.

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Rehmann

INDUSTRY
Client Accounting Services (Outsourced Accounting)

LOCATION
Troy, MI, with 17 offices nationwide

COMPANY SIZE
1,000+ employees

ACCOUNTING TEAM
120 employees

STAGE
Private

ERP
Varies by client (Intuit, Microsoft, Oracle, Sage)

OBJECTIVE
Standardize the Close for CAS clients for higher team productivity and more time for advisory services growth

WHY FLOQAST
- Flexibility and adaptability to multi-tenant CAS client environment
- Intuitive solution design and user experience enable adoption and change
- Agile ERP integrations available for a broad CAS client base

RESULTS
- Improved staffing models with task and timeline management
- Better workload balancing and transitions across the regional office network
- More time for client service plans and more lucrative advisory service offerings
- Better definition of tasks and client deliverables

When [Sharon Berman](#), a CPA and business advisory principal in [Rehmann](#)'s client accounting services (CAS) practice, examined how the 18 regional offices of Rehmann were handling the month-end Close and workflows for CAS clients, she found 18 different processes.

"Every office was a little different, some used spreadsheets, some used calendars, and others used combinations of the two," Sharon said. "We needed a solution we could customize per client."

FloQast was selected for its accountant-designed workflow and collaborative functionality.

"We were looking for a command center we could use to track tasks across our top 1,000 plus clients in our CAS practice, across all of our regional offices," Sharon said. "We pride ourselves on an integrated service approach, working collaboratively and transparently, and FloQast has made that happen for us."

Agile Integration and New Visibility Drive Positive Productivity and Feedback

[Linda Lutsic](#), a CPA and strategic business analyst, liaises between IT and the CAS team. She ensures that new solutions align appropriately with the CAS team's business requirements and has been a crucial part of the FloQast implementation team at Rehmann.

With two years of experience with FloQast, over 1,000 CAS clients on the platform, and high associate satisfaction, Sharon and Linda can confidently say the FloQast implementation has been a success.

"It was straightforward and intuitive to get moving," Linda said. "We've had nearly unanimous positive feedback; people have been super-pumped about the efficiencies gained with FloQast, as well as the ability to transition work when associates are on leave. It's pretty seamless."

Linda said FloQast has also been responsive to new development issues, providing attentive support and adding software engineering resources when needed.

"When we have special needs that come up, they bring their technical resources in right away to listen and determine a plan of action," said Linda. "There's been a lot of healthy collaboration on both sides, ensuring we're supporting each other and reinforcing the relationship."

Linda said FloQast's out-of-the-box integrations with spreadsheets, multiple ERP systems, email, and cloud storage providers have helped Rehmann meet clients' needs in dozens of industries of all sizes and shapes.

"Our CAS business requires a lot of flexibility and functionality, and FloQast provides that," said Linda. "We also feel better prepared for the future as we move into new markets and industries."

The [ReMind](#) tool, which automates time-consuming email information requests, has also increased productivity and time savings at Rehmann.

"We use ReMind for internal requests at Rehmann, as well as external requests with clients, especially for bank statements, inventory levels, and quarterly reports," said Sharon. "I think ReMind is a fabulous tool."

Higher Productivity and More Time for Advisory Services Made Possible by FloQast

Sharon said FloQast has removed much of the guesswork from Rehmann's workflow and helped codify it for others.

"We've taken a lot of what's in someone's head and put it in FloQast so that we're all marching up the field in the same direction with our client engagements," Sharon said.

Staffing levels at Rehmann have been easier to evaluate and manage as well.

"Having FloQast checklists, dashboards, reminders, and notes on clients has helped us increase productivity," Sharon said. "We have low turnover in general, but I know we've had people leave, and we haven't had to replace them."

Sharon said FloQast's standardization and automation are ultimately delivering more value for Rehmann and its CAS clients because deeper discussions can be had on more complex business issues.

"The goal is always to grow a client into advisory services, and we have more time to talk about that now and think about client services plans and growth opportunities," said Sharon. "We want to move from controllership engagements to advisory services, and FloQast allows us to focus on that."

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