Customer Case Study:
Boulay PLLP

CPA firm extends its back-office capabilities to more effectively measure profitable project performance

Boulay PLLP (Boulay) helps clients reach both business and personal goals through world class accounting, tax and audit, business planning and wealth management consulting. Boulay is one of the fastest growing CPA firms in the mid-west region. Yet, that growth presented the company with a challenge: change out a 10-year-old accounting and billing system that could not handle the firm’s growth nor was designed to support a professional services business model. Boulay wanted to optimize its billing and time and expense handling with an end-to-end ERP system built specifically for a professional services company. Boulay chose Deltek Maconomy to reach its goal of optimizing practice and resource management, managing cost, improving KPIs and driving profitable behavior throughout the firm.

Company: Boulay PLLP  •  Founded: 1937  •  Headquarters: Minneapolis, MN  
Industry: Accounting and Financial Consulting  •  Employees: 160  
www.boulaygroup.com
Boulay PLLP

Challenges/Objectives

- The company was using a decade-old accounting and billing system that:
  - Could not manage the firm’s growth or technically support its back-office
  - Was not designed to support its professional services business model
  - Did not have the ability to provide critical business intelligence and performance metrics to firm leaders and employees to grow the business
  - Was set up to handle specific business scenarios that no longer existed

Solution

- Deltek Maconomy was designed for professional services firms and provides both back-office support and daily time & expense capture
- Maconomy allowed Boulay to move from a paper billing process to an online billing process, which helps maintain the firm’s focus on process optimization via improved infrastructure
- Maconomy’s role-based dashboards provide firm stakeholders with a real-time view that helps improve client communication and reduce outstanding WIP

Benefits

- Deltek Maconomy helps Boulay evaluate its contribution margins by service line, project, and resources, allowing it to maximize the more profitable services and create greater efficiencies in less profitable ones
- Simplifies procedures for resource time and expense capture
- Enhances departmental sharing, analysis and long-term decision making
- Creates stronger back-office performance evaluation and billing practices, enhances scheduling integration for better resource allocation and budgeting, and improves focus on valued service offerings
- Provides real-time insight through custom dashboards that enables employees to track performance goals, which has resulted in improved cash flow, increased WIP and better client communications

“Our goal is to measure our data by each offering, to see exactly how our business is performing. That kind of information will help us adjust our services in a way that better meets our client needs.”

— Ron Overson, Partner, Boulay