

CUSTOMER SUCCESS STORY

How Jitasa and Bill.com Make Clients “Geek Out”

Jon Osterburg, VP of sales and marketing at Jitasa, and Christian Spearow, general manager of bookkeeping and accounting services at Jitasa, understand firsthand the idea of financial process transformation. The company provides finance and accounting services to nonprofits nationwide with up to \$30M in annual revenue – organizations with accounting processes in place that are often complex and in need of expert help. The firm, an early adopter of cloud accounting solutions, houses its operations in Boise, Idaho, but has offices worldwide that support numerous time zones.

In this interview, Jitasa leaders share why they chose to work with Bill.com and the benefits it brings to their more than 600 clients across the U.S.

On choosing Bill.com

Before Bill.com, we had an overall methodology for AP, but we had multiple ways to receive information depending on the client – like email and paper – and we needed to refine the process. When we found Bill.com, it consolidated all AP activities and removed the need to print and sign checks. We found it to be the easiest, most transparent way for our clients to process their AP.

Bill.com hit all the buttons for us. It handles document management, communications, tracking of invoices and statuses, signature approval, and the distribution process – all in a single automated process. It also helped us with a cultural change within the firm. We started defining what the process is and pushing that out to clients. With new clients, their whole world is changing as they adopt our accounting solutions and processes. With Bill.com, it's an opportunity for us to say, “Here's the process. Trust us. This works.”

A huge impact on productivity

Even though we were paying bills electronically, the ability to print checks was important. Generally, nonprofits can be behind the curve when it comes to technology, and we had clients that were hesitant to move to electronic payments. But we knew Bill.com would be a game-changer for them. With Bill.com, you can manage the entire review process online and choose to have Bill.com mail a physical check to payees as necessary. Other systems were not economical when it came to printing checks, or they lacked the ability to do so.



TYPE OF FIRM

Medium

EMPLOYEES

200

CLIENTS

600+

HQ LOCATION

Boise, Idaho

BILL.COM SERVICES

AP

INTEGRATIONS

QuickBooks Online

Bill.com has a huge impact on the productivity of our team. We had one client that required two full-time AP employees on the account that were responsible for managing the check process from printing to signing to stuffing envelopes. Once we converted that client to Bill.com, we were able to move those employees to accounting roles – a much better use of their time for the company. This is the story we are seeing over and over. With Bill.com, our U.S. team has more time because they no longer need to print checks or do basic data entry.



With Bill.com, it's an opportunity for us to say to clients, 'Here's the process. Trust us. This works.'

— Jon Osterburg, VP of sales and marketing, Jitasa

Reducing the chance for errors

The more you put your hands on something, the more opportunities for errors there are. That's why our favorite part of Bill.com is its AI-based feature called Intelligent Virtual Assistant. IVA evaluates each invoice as it enters the system and automatically populates information like amount, invoice number, PO numbers, and more. Instead of manually entering information, we simply review the populated information, and then it begins the automated review cycle. It's so much quicker, our staff is much more productive, and it reduces the potential for errors.

Making life easier for nonprofit clients

Executive directors of nonprofit organizations – those who most often approve payments – are often on the go visiting program sites and donors. Before Bill.com, paper checks would have to wait until they returned to the office for their approval and signature. It could lead to late payments and late fees. With Bill.com and digital payments, they can be in the back of an Uber approving bills on their mobile app. The same goes for nonprofit board members. They usually have full-time jobs in addition to board duties, which means they have limited amounts of available time. Now when they have a moment, they can pull out their phones or quickly log in via a laptop to approve bills. I had a client tell me, "We're geeking out over how easy this is. I'm definitely loving the increased oversight."

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