

## CUSTOMER SUCCESS STORY

# Blue Fox, AI, and Maximizing Value for Accounting Clients

Chantal Sheehan, chief of client happiness and CEO for Blue Fox, has firsthand experience with the challenges nonprofits face. The firm, which works exclusively with nonprofits and social enterprises, disrupts the traditional accounting model through technology, innovation, and a client-centric approach. Her objective for Blue Fox: Not to scale up, but to offer maximum value to clients.

In this interview, she explains how the new Bill.com experience and its AI-powered Intelligent Virtual Assistant amplifies advisory services and turbocharges efficiency.

**On the new Bill.com experience:**

The new user interface makes tasks easier. It requires fewer clicks, provides more details, and lets you quickly see notes in the system and payment methods. I always keep its to-do list open to help manage the team and clients.

I recommend that firms switch to it. It doesn't have a steep learning curve, and a wizard walks you through it. In terms of change, it isn't rocket science. It's a more efficient way to look at the same data.

**TYPE OF FIRM**

Small

**EMPLOYEES**

5

**CLIENTS**

75

**HQ LOCATION**

Melbourne, FL

**BILL.COM SERVICES**

AP

**INTEGRATIONS**

QuickBooks Online, Expensify

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-Chantal Sheehan, chief of client happiness and CEO for [Blue Fox](#)

### **How AI and the Intelligent Virtual Assistant enhance client value:**

We focus on leveraging technology like AI so that we can apply human time where it counts for clients. That's why the Intelligent Virtual Assistant (IVA) is impressive. The AI-powered IVA starts the bill creation process for us. It automatically pre-populates fields like vendor name, invoice number, and amount due. A bill is about 90% done before we even review it. It's next-level technology that saves time for my staff.

Its ability to find duplicate invoices is special. Clients and vendors often send the same bills more than once, and IVA flags them for our attention. If this happened with any other bill pay service, how would you catch that? You'd probably pay bills twice.

Most importantly, IVA further enhances our value by revealing inefficiencies. We can help refine processes by pointing out that a vendor is sending invoices 2-3 times a day or a staff member is missing attention to detail.

### **On client accounting services (CAS) and AP:**

It's stunning to me how much it can cost clients to handle AP. It's a waste of human time and talent, in my opinion. Bill.com should be on every firm's list of must-have platforms. I would not be able to offer client accounting services at margin without Bill.com. It saves so much time and makes CAS profitable in a way it wouldn't be with paper-based processes.

### **Reducing time spent on annual external audits:**

Auditors who are new to Bill.com ask me, "Why isn't everyone using this?!" They can review files virtually and reduce the overall audit time by at least several hours.

**"The Intelligent Virtual Assistant from Bill.com is next-level technology that enhances our value to clients and saves time for my staff."**

-Chantal Sheehan, chief of client happiness and CEO for [Blue Fox](#)

## A CLIENT'S PERSPECTIVE:

# The HOW Institute for Society

Mike Lenihan, program manager for the HOW Institute for Society, appreciates how Blue Fox is a confidant, partner, and advisor with considerable technical competencies. The firm introduced HOW, an organization that builds and nurtures a culture of moral leadership, principled decision-making, and values-based behavior, to Bill.com. Here, Lenihan shares how the intuitive solution streamlines work and enforces approval processes.

### On Bill.com first impressions:

As a startup with few-to-no systems in place for bookkeeping, accounting, and best governance practices, we looked to Blue Fox to advise on and help build processes that reflected our commitment to transparency and accountability. We had not used Bill.com previously and were pleasantly surprised at how intuitive Bill.com was. It made management of contractors' invoices very simple and straightforward, and from our perspective, effectively automated invoice submission, approval, and processing. We have built in multiple approver workflows to ensure adequate checks and balances. Bill.com has made it easy to implement our policies on internal controls, and it seamlessly allocates approval responsibilities.

### How the new Bill.com experience impacts work:

The new Bill.com interface is intuitive and action-oriented. I actually spend very little time in the dashboard because it takes me so little time to complete the tasks that I am responsible for. Email notifications direct me to the exact pages I need to look at, and the information on those pages is presented in a straightforward and uncluttered way.

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-Mike Lenihan, program manager for the [HOW Institute for Society](#)

### **On recommending Bill.com:**

We recommend Bill.com without reservation. It is a flexible and customizable tool that has made completing administrative tasks much easier and time-efficient without compromising details, controls, and quality.

### **The value provided by Blue Fox and its team:**

Working with Blue Fox has been a very positive and rewarding experience. We have always felt to be in competent hands, and that confidence has allowed us to make important decisions that can have an outsized impact on our small and young organization. We have integrated our Blue Fox staff as extensions of our organization's staff, and routinely ask questions of strategic value. They are knowledgeable, approachable, well-connected, and tuned in to industry trends and innovations.

## **Want to maximize your value for clients?**

Try a risk-free trial of Bill.com at [bill.com/for-accountants](https://bill.com/for-accountants).

