bill.com™

Customer Success Story

Tate & Tryon Lands New Clients and Strengthens Ties with Bill.com

David Bohn, CPA, a partner at top-200 firm Tate & Tryon, shares how Bill.com is a "quick win" for clients.

Tell us about your firm.

We work with nonprofits nationwide to provide tax, auditing, and outsourcing services. We fuel our outsourcing value proposition with innovative technology and efficient processes.

How do you use Bill.com?

It's a critical component of our outsourcing technology stack. We use it with roughly 100 outsourcing clients.

Bill.com is our quick win for new clients. When I show it to a prospective client, they instantly get it. With Bill.com, they can review and approve bills on the go as they visit their donors and constituents. They know when a vendor has paid and when a check was cashed. In the past, they'd have to contact accounting for that information.

Our peer accounting firms that audit our clients love Bill.com. They get read-only access, can sample selections online, and see a complete audit trail from beginning to end. They can perform their audits remotely.

How does the firm use Bill.com to build client relationships?

Bill.com helps us land new business and solidifies relationships with clients. For a new client, early-stage relationships are critical. Because Bill.com is easy to rollout, we can quickly take the pain of accounting off a new client's shoulders. In-person touches now focus on high-level conversations. Our clients overall appreciate that.

What would your life be like without Bill.com?

I don't want to think about that. Bill.com is a beautifully simple tool.

What tips would you give other firms?

There's an opportunity cost to resisting change. Be bold and jump in. Convert your clients to Bill.com and take advantage of its certification training program.

TATE & TRYON

INDUSTRY FOCUS
Nonprofits

EMPLOYEES
140

CLIENTS
600

HQ
Washington, DC and New York

BILL.COM SERVICES
AP

INTEGRATIONS
Intacct, Nexonia, Tallie

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