



Sum of All Numbers Customer Solution Case Study



Customer: Transcendentist
Web Site: www.transcendentist.com
Country or Region: Northern California
Industry: Professional Services

Service: Dental Office Bookkeeping
Provider: Sum of All Numbers
Website: www.sumofallnumbers.com

Customer Profile

Transcendentist calls itself the country's first "green" dental office. Practicing eco-dentistry™ in a spa-like dental environment, their patient-friendly approach values the planet and mixes leading edge technique with foot massage and meditative music.

Dr. Fred Pockrass and Ina Pockrass, the owners of the Berkeley, California dental office, are also the founders of the Eco-Dentistry Association, which provides educational materials and certification programs for dental offices and dental products to help "green" the dental profession.

Dental Office Reduces Accounting Fees and Year-End Headaches with Sum of All Numbers

"Sum of All Numbers is a joy to work with. They take the headache out of dental office bookkeeping. I feel like they are partners in the success of my business."

Dr. Fred Pockrass, Owner, Transcendentist; Co-founder, Eco-Dentistry Association

Transcendentist decreased their accountants' fees by 20% and eliminated year-end accounting headaches by using bookkeeping services from Sum of All Numbers. Technology and excellent communication also eliminated interruptions to busy owners and staff. A "clients first" philosophy keeps Sum of All Numbers on top of accounts so year-end accounting is painless and smooth. Transcendentist experiences a higher level of service from Sum of All Numbers' responsive staff without an increase in fees.

Business Needs

Transcendentist, a busy Berkeley, California dental office, retained the services of outside accountants and a bookkeeper. But, with 20 patients per day, many who buy dental products, the opportunity for transaction errors and incorrect accounting entries was all too real.

Year-end Problems

Errors accumulated throughout the year, resulting in a painful year-end process to balance accounts and close

the books. "Our prior bookkeeping service was not fully utilizing the QuickBooks software," explained Pockrass. "Our year-end was two to three weeks of hair-pulling working with the accountants to straighten things out." With the accountants billing at a higher rate than the bookkeeper, fees were piling up.

Interruptions and Delays

Dentists have a lot of things to worry about other than bookkeeping. Although the company's bookkeeping needs were moderate, the old school

approach of their bookkeeper took time out of the owner's day to manage the process. "Responsiveness is something we did not have with our prior bookkeeper," said Pockrass. "Sometimes she would not get back to me for a day or two when I needed a response within an hour."

Reliable and Tech Savvy

Eventually, Transcendentist's long-time bookkeeper was leaving the area. Locating a competent, reliable bookkeeping service was important to the success of their business. "What we really wanted was a company that understood the technologies that were available," stated Pockrass.

Solution

A call from a sales person resulted in Transcendentist engaging Sum of All Numbers for bookkeeping services in 2006. Since then Sum of All Numbers has provided QuickBooks, payroll, year-end, and outside CFO services to Transcendentist, including cash flow projections discussed in a weekly cash flow call with Pockrass. "We keep their financials organized and clean, process their payroll, and manage their cash flow," said Holly DeVito, Founder and CEO of Sum of All Numbers.

Great Communication

The staff at Sum of All Numbers work consistently to stay on top of accounts throughout the year. "Kristie and Holly and the whole team are great communicators," said Pockrass. "That kind of responsiveness tells me as a client that they are on top of my accounts."

Responsible and Responsive

In the rare case when something goes wrong, Sum of All Numbers is quick to accept responsibility. "They are extraordinarily responsive and take

immediate action," stated Pockrass. For example, at six in the morning I'm not really expecting a response, but I get one. They have never failed to resolve a problem quickly and efficiently. They are there when we need them."

Tech Savvy

The staff at Sum of All Numbers is experienced and easy to work with. They employ remote technology to work efficiently and solve problems quickly without interrupting a client's day. "Sum of All Numbers is very skilled with all aspects of QuickBooks and electronic communication," stated Pockrass. "They are great communicators and very pleasant people."

Non-disruptive

Bookkeepers can login to the Transcendentist accounting system when they are not in the office to make adjustments and reconcile bank accounts. "They use QuickBooks to the maximum extent," explained Pockrass. "And, they do it in a way that doesn't disrupt our business. That's a huge benefit."

More Service

In addition to the bookkeeping for their dental office, Pockrass relies on Sum of All Numbers for some other services. They manage the accounts of the Eco-dentistry Association which Pockrass co-founded. They also process Transcendentist's 1099s faster and at a lower rate than the accountants who did them previously.

Benefits

■ **Accountants Fees Reduced 20%**

With hard work, modern technology and great service, Sum of All Numbers keeps Transcendentist's accounts balanced and vendors paid

on time throughout the year. "Because the books are in better shape at the end of the year, our accountants bill less time," explained Pockrass. "Their rates are higher than Sum of All Numbers' rates and we're saving 20%."

■ **Smooth Year-end**

Transcendentist now completes its year-end accounting in less time and with less frustration. "I knew from Sum of All Numbers' excellent email communication that they were keeping on top of accounts," said Pockrass. "As a result, our year-end process is smooth and painless with no hair pulling."

■ **More Service, Same Fees**

Sum of All Numbers bills Transcendentist about 30 hours per month, which works out to about the same fees as their prior bookkeeper. "What we pay per month is the same but we're getting a higher level of service," said Pockrass. "Sum of All Numbers is absolutely a good value."

■ **Virtual Perfection**

Holly DeVito works hard to maintain a corporate culture at Sum of All Numbers where the client comes first. She hires people who fit that culture, are responsive, and easy to work with. All of the employees of her virtual company work from home, making life easier for them and for clients.

■ **Partners in Success**

The value Sum of All Numbers provides to Transcendentist is apparent. "Sum of All Numbers is a joy to work with. They take the headache out of dental office bookkeeping," stated Pockrass. "I feel like they are partners in the success of my business."