BeeneGarter LLP

Beene Garter Streamlines Their Client-Centric Technology

"The experience with Torrent has been great. They really get that process drives the technology, and they've been key in helping us define those processes as they build the system. And beyond that, they're responsive and helpful, even when we're in between projects. We feel like we have business partners to work with — but also friends who are helping us through this process."

Ashley Lampen
Director of Marketing and Business Intelligence
Beene Garter LLP

Beene Garter LLP is West Michigan's largest independently owned public accounting and business consulting firm. Providing a range of services — from traditional tax and auditing to payroll processing and financial software implementation and support — they are passionate about finding the right solutions to fit each client's unique, individual needs.

──── BUSINESS CHALLENGE ────

"We've been in business since 1949, and as you grow, you develop different processes and systems to capture the different data you need for the day-to-day job."

That's how Ashley Lampen, director of marketing and business intelligence, describes the former state of their internal technology. Beene Garter's teams knew they had all of the data they needed to provide the rich client experience they wanted. But all of that information was spread across multiple systems: their old CRM, spreadsheets and more.

These disparate systems were slowing their employees down with limited data visibility and disconnected processes. Their teams had all the required pieces to find the right answers, but it was taking them too long to pull the necessary data each time a question came up.

"We really wanted to get all that information in one spot so we could have 360-degree visibility into our clients' needs," said Lampen. Beene Garter needed a centralized, integrated technology suite to get their client experience to their desired end state.

They turned to the Salesforce® platform.

Disconnected systems

Inefficient processes

Limited data visibility

── SOLUTION ──

Beene Garter met Torrent Consulting through Salesforce, and the two sides got to work.

They collaborated to build Beene Garter an internal technology solution that fit the company's unique needs, while leveraging Torrent's industry-specific experience. As Lampen explained, "We felt it was important to focus on best practice. We didn't want to reinvent the wheel."

Beene Garter customized the Sales Cloud® suite to build a comprehensive view of their clients, prospects and upcoming projects. They integrated Sage Intacct® accounting software with their new solution, too, for a real-time view of their projects, project tasks and invoices — past and present — without redundant data entry. Meanwhile, automated processes and the platform's Chatter™ capabilities helped them streamline communication between teams.

In short, they got all of their data in one place, allowing their employees to spend more time focusing on the client experience.

Vision Workshop

Discovery & Design

Sales Cloud®

Sage Intacct Integration

── RESULTS ──

✓ 74% Salesforce adoption rate

✓ Streamlined data entry process, requiring fewer touches from teams

✓ Improved reporting on and visibility into client data

The company has already seen dividends from this new technology. "I had someone comment to me just this morning that she loves that she doesn't have to hunt and peck for information anymore. She can just go to one place to find all the information she needs," Lampen noted.

Across the company, teams are engaging with the technology to support their client interactions, saving them time and energy. But even so, Beene Garter feels that they're not finished with their technology transformation. They're hoping to expand on the platform in the future to drive even deeper client engagement.

As Lampen said, "We're at a point where we've got all of this information in there, and now we're really figuring out how we can use it best, which is exciting."