



CASE STUDY

Pine Cove Consulting LLC

An outdated accounting system was slowing down Colby and Brandon's otherwise fast-growing MSP. With Red Earth's support, converting to QBO saved them ~10 hours of work a week

Colby and Brandon Vancleeve have been a part of Pine Cove Consulting their whole lives. When their father, Rick Vancleeve, founded the company in 1993, the two brothers started learning the ins and outs of the business and seeing firsthand what perseverance and hard work could achieve. Over the years, Pine Cove Consulting has grown to a team of 25, providing IT support to their over 20,000 users across four states and 15 unique locations.

In 2021, Brandon and Colby officially assumed ownership of Pine Cove Consulting, Brandon as company president and Colby as Head of Operations.

Rick Vancleeve had always told his sons, "You get better or you get worse, but you never stay the same." With this lesson in mind and a powerful family legacy behind them, Brandon and Colby vowed to make Pine Cove Consulting the best it could be.

Colby and Brandon prided themselves on staying on the cutting edge of new tech, but their accounting system was a pain point for growth.

Staying at the forefront of new tech is vital for any MSP. As their industry grew and developed over the past three decades, so too did the Vancleeve family and Pine Cove Consulting.

But even as they were accelerating their customers' tech solutions, one part of the company had yet to grow with them: their accounting system.

Over the years, Pine Cove has used a variety of accounting systems to support business growth. The company had been using QuickBooks Desktop (QBD)

to handle all their accounting for nearly 13 years. Katie Vancleeve, Pine Cove's Finance Coordinator was tasked with updating the accounting system for the growing MSP.

Katie leads a team of three, responsible for all administration of the growing company. Becoming increasingly frustrated by the lack of independence she had working in QBD, she found herself working against QBD more days than she was working with it.

Katie felt like a burden to her support staff, needing to ask them to open up IP addresses so she could connect to the company's remote desktop portal in order to work in the accounting file from different locations.



"I like to work when I need to work. Sometimes when I try to go in at 6 or 7 at night or any off hour and you can't get in, that was the big problem. I don't want to reach out to my staff at 10pm so I can get in"

Colby echoed these frustrations:

"We are a work from anywhere company, and QB Enterprise didn't make it easy to work from anywhere."

Pine Cove's growing demand for their services warranted a change in internal operations. Katie and Colby even considered hiring an additional administrative person to lift some of the burden of data entry from Katie, but this would be a substantial cost with no revenue increase. With the Vancleeves' growth mindset and increasing demand for their quality services, they needed a way to break free from their accounting bottleneck.

Colby and Katie questioned if a cloud-based accounting system was truly adequate for their needs.

While the husband and wife Operations duo knew something needed to change with their accounting system, they were hesitant with QuickBooks Online (QBO) as the answer.



“We were worried it’d be a watered-down version of QBD. That it wouldn’t have what we needed or be as robust.”

They also faced several unknowns about the conversion process. How long would it take? Would they lose any of their records in the process? Would they need to shut down the business?

And the biggest question of all:



Would converting to Quickbooks Online provide a high enough return on the time investment, financial investment, and capacity investment required to implement the new system?

After hearing about their challenges, Freddy Flis, a consultant at Wise-Sync, recommended they reach out to the Red Earth team. Freddy was a fan of the work we’ve done in the past researching and writing about the MSP industry, and he knew we are committed to successful QBO integrations..

We first had a Discovery Call with Colby and Katie to learn more about their struggles, needs, and goals. Efforts spent getting to know our clients resonated with Colby as a business owner.

As a consulting firm, Pine Cove spends a fair amount of time listening to their clients. They know how important it is to really hear someone out and not just rush them into a prefabricated solution. Colby found a familiarity in our processes and appreciated the time we took to listen to their particular situation.

Learning about a client’s unique situation is significant to our team. While we love to be part of a company’s success, we also don’t kid ourselves into thinking we’re the right solution for every business out there. We want businesses to succeed, so if we don’t have the expertise or capacity to help you, we want to use your resources wisely and will refer you to someone who can help better meet your needs.

After listening to Pine Cove, we knew we were a great fit to help them achieve their goals. With this in mind, we prepared three different service level options for Colby and Katie to consider. After they made their decision, it was time to get to work.

Pine Cove was able to convert to QBO in just three days, without shutting down the business.

To begin their conversion process, Katie and her team received a checklist of everything they would need to do or provide us with in order to make the transition as smooth as possible. Because the QBO conversion process can feel stressful or daunting, we break down the requirements into smaller, less intimidating pieces. We also walk clients through each one of those pieces to ensure questions can be asked and answered along the way.

At our Kick-Off meeting, our team was able to meet the Pine Cove team. When working virtually, we place high value on our clients seeing the faces of those who'll be providing training, answering their emails, and handling their account. At this meeting, we also discussed the plan in detail so that Pine Cove could ask any lingering questions to not only feel confident about the switch, but excited for it.

Finally, it was go-time. The preparation done by Pine Cove allowed the Red Earth team to convert from QuickBooks Desktop to QuickBooks Online over the course of three days. While our team got to work, for Colby and Katie, everything was business as usual.

“A big win was not having to shut down the business. We were able to keep getting money in and out the door and not shake up how we ran things.”

But our role as your partner isn't finished just because the data conversion is. Setting up a new system without providing the proper training would be leaving the job only half done.

We tailor our training timelines to each unique business, based on the size of their team, their budget, and their goals. Training can be as straightforward as a list of recommended tutorials and videos or involve site visits where we sit down with your team in person and walk them through their new systems.

Colby, Katie and the accounting staff received training over the next six weeks, including weekly video calls with Paul, a member of the Red Earth team.

“It was so nice to have a friendly face in this process.”

With a well-managed QBO conversion process and follow up efforts, Pine Cove is able to save hundreds of hours and the cost of hiring additional personnel for their accounting system.

Colby and Katie immediately started seeing the benefit of switching to QBO.

“There were parts of our process that I didn’t even know were bad until I saw how quick and easy they could be!”

With their new systems simplifying tasks like payroll, bank reconciliations, and monthly close, plus a generally more streamlined workflow in their back office, Colby and Katie estimate they’re saving about ten hours of work a week.

That’s nearly 600 extra hours a year!

Katie feels like she can finally exemplify Pine Cove Consulting’s work from anywhere ethos. She can check on the company’s accounts anytime, anywhere without the constant battle of logging out or opening a new IP address.

They’ve also managed to save the cost of hiring a whole new administrative assistant.

“When you hire an admin person, that’s 100% cost to the company. That’s a hard pill to swallow when you’re looking at growth.”



Now, Colby and Katie have more time, freedom, and headspace to focus on the bigger picture of Pine Cove Consulting, like financial strategy and employee development, or to simply kick back with their son and two dogs and enjoy the beauty of Wyoming. If they could tell other MSP owners one thing, it would be not to wait.



BOOK YOUR
DISCOVERY CALL

Of the transition, Kate said:

“Being able to merge things (in QBO) now is life-changing for us”.

We’re proud to support business owners who don’t want to stick to the status quo, who are willing to make a change from the way things have always been done. Though they had their fears and nerves about the process, the Vancleeve’s are the true heroes for identifying that a stronger infrastructure would support their growth, and pursuing the necessary changes to enable it.

Software migration and accounting file changes can be a painful process. The good news is, it doesn’t have to be. By simplifying the conversion process with to-do lists, a clear plan, and continued support, we take the edge off a financial system shift.

If you’re ready to unchain your MSP from an outdated accounting system and see the difference QBO can make, **book your discovery call today.**