

# *High Turnover, Low Performance From Bookkeeping Staff Was Holding Steve's Business Back.*



## ERGOS Technology

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# Case Study

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Founded by Steve Winter in 1997, ERGOS Technology is a managed IT service provider with the ability to design, maintain and install any size IT infrastructure for small and medium sized businesses. Headquartered in Houston, ERGOS supports an international base of clients with a combination of hosted, onsite and remote support.

**F**or years, Steve Winter achieved sustainable market growth by adapting his IT service strategy to meet the evolving industry changes, including the introduction of Flat-Fee Worry-Free IT™. Winter had big plans for his growing business, including the eventual sale of a profitable company.

As a technology expert who provides peace of mind to fellow entrepreneurs and their companies, ERGOS CEO Steve Winter also recognizes the importance of keeping a close eye on his financials to ensure the overall health of his business. That's why he has entrusted Houston CPA and consulting firm TR Moore & Company, a Doeren Mayhew firm, for tax advice and insight into the numbers. But for many years, Winter relied on QuickBooks software and his office manager/bookkeeper to perform the everyday bookkeeping role for the company.

A rash of high turnover and low performance caused Winter to realize his bookkeeping issues were holding back his business and preventing him from focusing on the bigger picture – growing the business he would eventually sell. “I had three bookkeepers in an 18 month period,” admitted Winter. “The last one ran off with her boyfriend and child, leaving us high and dry. Events open your eyes to different things,” said Winter, “and it’s hard to build your business when your books are a mess and your bookkeepers keep disappearing.” Winter was motivated to fix the problem once and for all by outsourcing his bookkeeping functions to GrowthForce in 2008.

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- Steve Winter  
ERGOS Technology Founder

## Power Of Three

### >>ERGOS, TR Moore & Company And GrowthForce

“A few years back, I hired GrowthForce for a one-time diagnostic project,” said Winter. He further explained that, “they integrated my QuickBooks and ConnectWise, automated some processes, and coached my office manager on how to work more efficiently. This saved us four days of labor each month and produced great results, including accurate job costing. This time, when my bookkeeper vanished overnight, I knew exactly who to call.” Winter reached out to GrowthForce President and CEO Stephen King.

King explained that, “Steve Winter asked me what it would take for GrowthForce to take over his bookkeeping functions because he never wanted to go through the pain of training a bookkeeper ever again.”

GrowthForce provides businesses with outsourced bookkeeping solutions, so owners can make strategic decisions based on timely and accurate financial information. GrowthForce President and CEO Stephen King expounded, “In an ideal situation, we are working alongside a client’s CPA or outsourced CFO to offer the best of both services – our foundational financial information combined with their strategic business advice. Our relationship with ERGOS Technology and their Houston CPA firm, TR Moore & Company, is a case in point of the power of three.”

“One of the first things we did,” said King, “was visit with TR Moore & Company’s Consulting Partner, Jennifer Mailhes, to find out what she needed from us to continue performing as trusted advisor to ERGOS.”

“Honestly, as a CPA, I didn’t want to focus on doing ERGOS’ bookkeeping, when my time could be better spent giving strategic, not tactical, advice,” said Mailhes. “With GrowthForce in the fold, I could trust that the accounting was being done right and fully focus on providing the high-level, strategic insight my clients value.”

As with all of its clients, GrowthForce assigned a team of bookkeepers, clerks and senior associates to ERGOS. This strategic approach allows GrowthForce to streamline processes, mitigate staffing pains, and deliver timely and accurate financials that have been reviewed by several sets of eyes. This expertise-as-needed technique, along with incorporating cutting-edge technology and cloud-based systems integration, allows GrowthForce to create a seamless relationship between the processing role and the analytical role. King explained, “We speak the same language and we have the right tools – technology and team – to deliver the foundational financials that a CPA or outsourced CFO needs in order to analyze the business. And, as a CPA myself for the last 30 years, I know that CPAs and CFOs take their trusted advisor role with the utmost seriousness. They want to dive deep into the financial information and provide the right advice at the right time to help business owners achieve their goals.”

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GrowthForce CEO

## Taking IT To The Next Level

### >> Financial Intelligence Allows ERGOS Able To Position Business for Sale

With the accurate financial information provided by GrowthForce, and the strategic financial advice offered by Doeren Mayhew firm TR Moore & Company, Steve Winter was able to devote his attention to the company's overall goals.

"We went through a complete business change," said Winter. "Transforming your business model is a challenge; we were a preventative maintenance model based on hourly billing and now we're a flat-fee model. It's based on results and not someone billing you per hour. And with the help of a third party, we were able to come out with a cloud offering, and expand our market in new directions."

**"P**urchasing ERGOS was a no brainer. We never see this level of professionalism in this size of a company, and the confidence we had in ERGOS and its potential was clearly reflected in the integrity of their books."

- Salim Zakhem  
ERGOS Technology Owner

The power of three paid off when Winter was able to position his business to attract the right buyer for the right price. As a CPA firm with an investment banking arm, TR Moore & Company was also able to assist on the transaction. "The sale was straightforward, because ERGOS could easily demonstrate results with the presentation of clean and meticulous accounting records," said Mailhes.

When the interested buyer brought in his CPA for due diligence, they were in and out in three days. "Purchasing ERGOS was a no brainer. We never see this level of professionalism in this size of a company, and the confidence we had in ERGOS and its potential was clearly reflected in the integrity of their books," said new owner Salim Zakhem.

## GrowthForce Delivers The Financial Intelligence

*So Smart CEOs Can Focus On What Matters Most - Growing The Business.*

- QuickBooks® Accounting System Setup, Design & Optimization
- Dedicated Team Of Experts - No Hiring Or Turnover Worries
- Internal Controls For Fraud Prevention
- Automated Paperless Bill Payment
- Industry Specific Financial Reporting
- Filing Of 1099s
- Year-Round Audit Ready Books
- CPA, CFO & Investor Friendly

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