



CPA Enhances Client
Experience and
Increases Efficiency
**with Mango Practice
Management**



Executive Summary

Mission

Leverage technology to increase operational efficiency and improve the client experience

Challenge

Tech-savvy accounting firm needed a solution to take them from Excel sheets to the cloud.

Roadblocks

- Tedious manual processes of managing an accounting practice
- Difficulty managing deadlines and client deliverables
- Slower-than-desirable payment process

Solution

Implementing Mango Practice Management to make practice processes less cumbersome and easier to manage.

Benefits

- Access to all client information
- Faster payment times
- Access to the same tools provided by more expensive providers
- Easy deadline management
- Improved security and privacy support for clients



“When you start out as a two-person firm, you just do what you do, but then all of a sudden, there’s eight of us. We need procedures, we need onboarding, we need a process.”

SCOTT FRICK, CPA

The Challenge

Increasing efficiency and enhancing client relationships by moving from cumbersome Excel spreadsheets to a cloud-based software

Based in Kendallville, Indiana, Scott Frick, CPA, has been in practice since 1993. His accounting firm offers a range of services, with an emphasis on the local business community and high-income, high-net-worth individuals.

Scott’s team, which includes several accountants and administrative staff, offers holistic services that include tax preparation, accounting, payroll, and consulting. They like to enable the success of their clients, saying: “We do what we do so you can do what you do.”

Running an accounting firm was initially harder than he expected; “What was I thinking?” he joked. “You learn by fire.”

One of the many challenges of running a firm is managing the necessary technology, he said: “I like tech, not afraid of it, but I have other focuses.”



But as you grow, you have to adapt, Scott explained. He soon realized that, “To become more efficient, technology’s going to have to be part of that process.”

Since he started out, Scott used traditional solutions like Excel spreadsheets to keep track of client data and deadlines while processing the firm’s time and billing through QuickBooks. These practices seemed to consistently come up short, especially as the company grew from two team members to eight, leaving Scott looking for solutions that could keep his team organized and improve his client relationships and time and billing processes.

The Solution

Time and billing software from Mango Practice Management

Being a tech-savvy firm, Scott’s team began looking for new technologies to make things easier for his practice. After looking into a few options that either didn’t meet their needs or were prohibitively expensive, they discovered Mango Practice Management (formerly ImagineTime).

In Mango, the firm found a solution that worked for their firm and provided valuable tools to improve their internal processes.

“The project management [feature] is one of my favorite things,” Scott said. “And the portal is wonderful. I’ve had outside users say it’s one of the best and friendliest that they’ve used.”

The Mango tools that Scott says benefit his firm the most are:

- The secure client portal for client communication
- Time-tracking tools that keep his team on task and keep hours logged correctly
- Management reports that keep him in the know



- Electronic payment processing that gets him paid faster and makes the payment process easier for clients
- Project management to keep office workflows running smoothly
- Document management that makes sharing files and obtaining signatures easier

Mango has allowed the firm to stay ahead of the curve, Scott said: “We do a lot of things with tech that maybe other firms our size don’t do, [or other] competitors locally.”

About Scott Frick, CPA

An accounting practice owner since 1996, Scott Frick, CPA, works out of Kendallville, Indiana, with six staff members and serves businesses and individuals from Noble County to Boyne County, Michigan, and Lincoln, Alabama.

With a wide range of professional experience, Scott Frick and his team are well-equipped to handle the needs of many kinds of businesses, including retail, construction, professional services, manufacturing, distribution, farming, and more.

Scott’s practice provides holistic accounting services that include compilations, reviews, financial statements, tax planning, and connecting bankers with investment advisors.

“When our clients succeed, we love that,” Scott says.

About Mango Practice Management

The company known as ImagineTime was founded in 1999 by CPA Fred Lindsley, who needed a software solution to give him better visibility of information and a platform that would allow him to make data-driven decisions.

After developing a solution that gained steam with his employees and partners, he took ImagineTime to market and focused solely on providing accountants with the tools they needed.

In 2018, Carl Coe acquired the company and moved to modernize the platform to allow the platform to provide its services to a more extensive base of accounting professionals, and acquired Mango, which became the flagship product for the company.

Mango Practice Management provides a wealth of robust tools for accounting professionals like:

- File sharing and eSignature
- Time and billing software
- Project management software
- Document management
- Reporting and analytics
- Integrations with tools that accountants use regularly
- Mango websites

Mango strives to provide accounting professionals with the best tools to grow and scale their businesses. Our software is designed by accountants for accountants, so you can rest easy knowing that when you make the switch to Mango, you'll be getting tools that are created with your profession in mind.