



## CASE STUDY

Discover how Cherry Bekaert gained speed and a competitive advantage by creating a predictable process with Strongbox.

### AT A GLANCE

#### GOAL

- Advisory services with industry insights
- Digitally driven practice
- Scale and growth

#### BENEFITS

- Deep insights in 24 hour turn around time
- Upskill of controllers and clients
- More accurate pricing for projects
- Rapid growth



"As our CAS practice is digitally aligned, we love tools like Strongbox that help us organize and manipulate data in a practical and easy way.

The ability to extract data from systems unlocks potential for standardization that will help our firm grow rapidly."

#### DIXIE MCCURLEY

Partner, Cherry Bekaert  
Advisory

### THE STORY

Dixie McCurley established the CAS (client accounting services) practice for Cherry Bekaert a year ago with the goal of adding value to clients through advisory insights. A national accounting and consulting firm, Cherry Bekaert prioritizes investing in efficient, innovative processes to become the "Firm of the Future" for their clients.

### THE OPPORTUNITY

During their sales process, the CB CAS team would estimate what work would need to be done for the potential client. Frequently, however, after spending hours extracting the client's accounting data, a different picture would emerge.

This would require additional reports from the accounting system and unplanned hours from the team to pull the data before the additional analysis could begin.

Regardless of what industry the client is in and what accounting system is used, Dixie's team needed a uniform output with that gave a consistent, complete financial picture.

### THE RESULTS

With Strongbox, the CB CAS teams "are able to spend their time analyzing correct data sets with industry insights rather than taking double the time to pull data and then analyze. We are able to upskill our team and clients quickly with the Strongbox information."

Strongbox has given Dixie and her team a competitive advantage. "We are able to share specific insights due to the information we gain. Potential clients have been impressed with the advisory style approach, rather than simple bookkeeping."

And they can do so faster than the competition because of Strongbox. They can offer deep insights in a 24 hour turn around time. "Strongbox will enhance our team's ability to standardize across industries and use our controllers at a higher level."