Building small businesses on a tech foundation

Have customers that can’t always make it to your business due to geography, weather or a little of both? Jodie Heal does too. Rather than it being a business obstacle, it’s part of her competitive differentiation — using technology at the core of her accounting services.

Jodie started Heal Accounting in her remote coastal community of South Thomaston, Maine with two goals: to leverage her extensive accounting and technology skills while cutting her commute. Three years, nine employees, and 250 clients later, Heal Accounting has optimized its niche helping small organizations—some on fairly isolated islands off the coast of Maine—build profitable, sustainable and compliant businesses.
**Business issue: Building compliant businesses**

“As a career CPA, I’ve never seen an employer who filled out all the compliance-related forms correctly, every time,” said Jodie Heal. “As an auditor, I saw this everywhere—from large cities with thousands of employees to businesses with fully-staffed HR departments—who didn’t have it done right. With larger organizations, they typically have the resources to pay for the fines when they get it wrong. Small businesses often don’t have that luxury.”

So when Jodie opened her own company, focusing on small organizations, she recognized two advantages that she—and they—could put to work from the beginning. First, low cost, easy-to-use software to help cover all the “back office” practices needed to support a growing business, and second, access to always updated information on business compliance.

**Solution: Connecting in the cloud**

Heal Accounting suggests their customers take advantage of cloud-based software to approve and pay for invoices and bookkeeping. And, as they start to grow and add employees, Heal Accounting recommends Zenefits to streamline their hiring and ensure all their people and payroll practices are compliant with local regulations.

**Goof-Proofing Compliance**

“I love that in Zenefits, you can’t fill out the forms incorrectly! You can’t progress to the next step or leave a section in a W-4 blank,” adds Jodie. “It’s hard enough for those of us who understand the paperwork.”

In addition to mandatory form fills, Jodie says she uses Zenefits for its helpful, customizable templates for employee offer letters, manuals, vacation policies and access to an HR Library with insights on best practices, strategies and compliance issues alike.

For her own growing firm, hiring happens quickly. With the addition of 4-5 new clients per week, Jodie works to ensure she has new staff in place as needed.

“With Zenefits, I can hire and get new people up and running quickly. When they get here on their first day, they are already done with the paperwork that could take half a day to do the old manual way. And I know I am compliant with each and every hire; technology gave my business an edge from the beginning,” adds Jodie, who recently collected two awards for her advanced use of technology to help her clients succeed.

“Some of my clients in rural Maine live or work on islands. Often, they can’t get out of their homes due to the weather, can’t get a ferry or can’t leave the business because they are the only ones there. So helping them build a foundation with technology, gives us all more time to do what we love.”

**Connecting Culture**

For Jodie, it’s not only important to do work she enjoys but to make the experience of working in her business enjoyable for her growing team. She also uses Zenefits to help her deliver a fun culture in the typically dry business of tax and payroll consulting. For example, as part of her hiring process, she builds customized profiles for each team member, helping her keep track of clothing size, favorite snacks and restaurants, which she uses for celebrating staff birthdays and work anniversaries. She also uses Zenefits mobile time-off application to make it easy for her team to request time off—from wherever they are.

“Because I run a small firm, if I don’t pay people to do it, I do it. Zenefits helps me do a lot of what I need to run my business in half the time. A win/win!”

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**CASE STUDY // HEAL ACCOUNTING**

Zenefits has taken a huge responsibility off me to keep us in compliance; compliance mistakes could be the difference between keeping a small business afloat or sinking it.”

**JODIE HEAL, PRESIDENT**

Learn how you can grow your team with Zenefits

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