

Canopy Helps Accounting Firm Improve Onboarding Processes

Background: [Fulling Management & Accounting, Inc.](#) was founded in April 2000 out of Olathe, Kansas. The firm services business clients all over the U.S., including Alaska, Hawaii, Florida, Texas, New Jersey and more. Canopy has helped the 14-person team keep things organized and has made remote working much easier. We spoke with Rusty Fulling, CEO and founder of Fulling Management about how Canopy has improved his firm's workflow. Check out what he had to say.

Cloud-based software enables flexibility

Using a cloud-based software solution like Canopy gives Rusty and his employees the freedom and flexibility they need to do their jobs. It eliminates the need to have a dedicated server just for their workflow system. Being able to log in from anywhere and any device and be able to see what everyone is working on has been a huge help to Rusty in running his firm remotely. Whether he's at a Starbucks down the street or on the beach, he's able to stay as connected as he needs to be.

"That's really been extremely helpful," Rusty said. "That's the huge value is just the flexibility, knowing that as long as I have a login somewhere, I have access."

Additionally, 65% of the firm's clients live out-of-state and during the COVID-19 pandemic, the firm's office worked remotely as well. With Canopy, working remotely has been a breeze, according to Rusty.

BY USING CANOPY, RUSTY FULLING HAS:



Cut the time spent on client onboarding by

50%



Been able to serve the

65%

of his clients that live out-of-state

“Canopy is very integral in our day-to-day activity.”

–Rusty Fulling, CEO and founder of Fulling Management & Accounting Inc.



Internal processes have improved

The software has helped improve communication and internal processes at Fulling Management. For example, when a team finishes a financial statement another one of the managers needs to review the reports. Completing these peer reviews has gotten a lot easier with Canopy, thanks to the option to add a relative date to tasks. This way, the managers don't get a task popping up on their to-do list until the reports have been marked as complete within Canopy. This simple automation has removed the need for back-and-forth between teams to communicate when reports are done and where in the process these financial statements are—instead, all of that information can be found within the task list. No one needs to hassle anybody to get the reviews in because Canopy does the work for you.

This is just one of the many internal processes Canopy has helped improve at the accounting firm. Thanks to Canopy's templates, Rusty and his team have cut the amount of time it takes to onboard a new client in half.

In the firm's old system, team members would have to manually go step by step to onboard a new client or even a new employee, and there was no way to create a template for this process. So each time the firm signed on a new client, that meant a good chunk of time was spent simply getting them onboarded. Now, Rusty and his team use an onboarding template in Canopy that is already all built out for them. They have templates for onboarding a new client, onboarding a new employee and many others that help save the firm time. Previously, the firm's standard operating procedures were all created ad hoc. Now, their SOPs live within Canopy.

“The templates have saved a tremendous amount of time,” Rusty said.

Before implementing Canopy, Rusty and his colleagues had tried other software solutions that ended up being a “trainwreck,” he said. But now, each member of the team starts and ends their day within Canopy, which helps things run smoothly in the office every week.

“We log into Canopy in the morning and then when we log out in the afternoon, we're logging out of Canopy,” Rusty said. “We're literally using it as our workflow management with it throughout the day and it's very integral in our day-to-day activity.”