



How OnPoint Accounting Group Uses Dext To Drive Practice-Wide Efficiency



Meet Johann Goree

As an existing Dext Prepare partner, Johann Goree, Group Managing Director at OnPoint Accounting Group, knew all too well the value of data extraction and entry tools. Now, after implementing Prepare's new Practice Insights feature, we caught up with Johann to discuss how it's helping him boost efficiency and see the bigger picture.

About the firm

They say the best ideas come to us when we least expect them.

For Johann, that big idea came to him when at the pub. Back then, he supported his friends with business and bookkeeping advice in return for pints. That, coupled with what he saw as a distinct lack of support from accountants in his area to small businesses, presented an opportunity. So, by swapping out pints for pounds, Johann set up what is now the OnPoint Accounting Group.

Today, OnPoint Accounting Group operates in 4 different locations with a team of 14, serving around 950 clients. Advisory remains a key focus area for those doing the accounting. As a Chartered Manager, though, these days, Johann works at a broader level, focusing on change management, people leadership and improving systems.



The challenge

Much of what Johann does on a day-to-day basis is around efficiency. Whether it's spotting opportunities to refine processes, or managing his team's workload, Johann, with the support of his Operations Manager, oversees the entire workflow, so others don't have to.

As an early adopter of data extraction and entry tools, Johann has always been an advocate of tools like Dext Prepare and the value they add.

For Johann, there's never been a glaringly obvious challenge. But he did want more from his data tool – something that went beyond just data capture and processing. In order to drive efficiency, he needed a solution that highlighted where those opportunities might be. When he heard Dext Prepare was set to release a feature that did exactly that, the decision was simple.



We've always understood that every penny I spend on a document being processed by Dext, saves me pounds and pounds compared to a person sitting there and processing that manually.



The solution

In short, Practice Insights allows leaders and managers like Johann to get more from otherwise ordinary data. While already familiar with Dext's value, Johann explained how Practice Insights quantifies it even more by adding another layer of insight.

"What Practice Insights gave me was a better understanding of the value we're getting. I truly understand the value that system is bringing me, and the time saving we're seeing for the team."

Johann went on to validate his point by actually spelling out how much time Practice Insights helps him save:

"In the last 30 days, we've processed 3,323 documents in Dext. When you times that by 5 minutes for each document, then divide that by 60, you're left with 276 hours saved on manual processing...Practice Insights quantifies that really nicely."

Efficiency-improving features

The core functionality of Practice Insights lies with its metrics. These are key to helping management-level staff, like Johann, identify potential bottlenecks and opportunities to improve. As someone who drops into the dashboard more than once a day, Johann names Auto Publish, Items to Action and Items Submitted as his three key features.

On Auto Publish, he says that out of the 3,323 documents they have to process, 67% of those have been processed and pushed through to QuickBooks Online, automatically. The real value, though, comes when Johann is able to compare and benchmark that percentage to the previous month.



My team hasn't had to process those documents manually; 67% have gone straight to QuickBooks. I know that's 5% better than it was at this time last month – because Practice Insights is telling me that.



If that percentage were to drop, Johann has the visibility to ask why that's the case and, importantly, the ability to then go and address that problem with his team. The Items to Action metric is more of what Johann describes as a "prompt to refocus" – which, above all, is a great way to keep the workflow moving in

the right direction. Items Submitted offers a different set of insights that shows Johann when particular clients send through their documents. Like the other metrics, he's able to spot patterns or spikes in activity. This, as Johann describes, allows him and his team to act proactively.



If there's always a spike in document submission at the start of the month, why is that and do we need to rethink our own workload to help control it? We had 300 documents submitted on the 8th February – why? Is that one client dumping an entire month's worth of documents in one go? We can then have a chat about them getting those in more regularly so we can help keep their records more up to date.



"Gamification does work"

A somewhat additional and, at times, overlooked benefit of accounting tools like Practice Insights is the ability to gamify processes and incentivise those doing the work. As well as benchmarking general bookkeeping activity, Johann realised he could also benchmark his team. After speaking to his Account Manager at Dext, it became clear that the metrics had even greater value:

"Being able to see our auto-publish rate was great, but I wanted some benchmarks to go off. After speaking to my Account Manager, I found out that 72% was the highest on record, and the average was 40%. With that knowledge, I was then able to set my team a target of 72% – which they've smashed twice, so far. By gamifying data processing, we have now got these fantastic results. Practice Insights shows that gamification does work."

The Impact

Besides better visibility of client bookkeeping data, team performance and a range of guiding metrics, the Practice Insights dashboard has helped Johann in his search for practice-wide efficiency. Much of the time, those goals are a work in progress; complete efficiency is hard to come by. What Johann now has, though, is a tool that validates that work and justifies his long-standing faith in data automation tools.



I need to make sure that we're getting value for money from every tool we're spending money on. I can easily turn around and say, yes, Dext is delivering value for money – and it's because of Practice Insights that we can now do that.



Dext | Prepare

If you'd like to find out more about Practice Insights and how it can help your firm, we'd love to talk. For existing Dext partners, feel free to get in touch with your Account Manager. If you're new to Dext, or would simply like to learn more, please click below.

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