

## CASE STUDY – Improving the Process

**Client:** Small private HVAC and Plumbing company

**Client Location:** Maryland

**Problem:** The Company manages staff out of two office locations under two different divisions. They have an in-house bookkeeper who was recording timesheets daily in a journal book. She was recording it by day and by project, however she was recording a straight 8 hours per day per employee. With no way of knowing whether a person worked 8 hours that day; or more or less. We recommended to management that they get a system where employees could clock in and out so they could get actual time worked. This would also help bring them into the 21<sup>st</sup> century tracking time and remove that archaic process, which would free up time for the bookkeeper to work on other things.

**Goal:**

1. Maintain and manage accurate time keeping records for the company.
2. Create policy and procedure around time keeping that were also compliant with state regulations
3. Update the operational process of recoding time daily.
4. Implement a process using an add-on app that integrates with QuickBooks to create efficiency

**Solutions:** With the help of the TSheets staff, we set up, installed, and trained the staff on how to use a third-party TSheets time-tracking application.

- The Company became compliant in its time tracking process
- Develop customized step by step operating procedures on how each employee would track their time and how management would approve their time.
- Create time in the bookkeeper's schedule by removing the need to track down hours worked from staff.
- Create a Financial Flow System™ to develop a better workflow process.
- Save time by implementing a system that fully integrates with the accounting software

**Results:** After implementing our recommended solutions, management was able to:

- Gain financial insight around how much time each job or project was taking to complete.
- Manage and streamline the payroll process.
- Delegate duties to trained staff who manage employees and their time.



## Testimonial:

“Before I made the decision to sign up with T-Sheets (in response to Sherrell’s good counsel) I was employing a hand-written method for tracking the employee’s hours, tasks, and place. This method had worked very reliably for most of the time the company has been in existence, it even became pivotal in winning some court cases where the labor time was questioned. After several discussions and phone interviews with the team at T-Sheets it became clear that the benefits of using T-Sheets was going to outweigh the monthly cost, it allowed the bookkeeper to focus on tracking other aspects of the operations such as; credit card purchases, receivables, and payables. I have experienced a great deal of improvement in the accuracy of hours actually worked through the GPS feature, I no longer pay for travel time or those times when the employee leaves early without reporting it to his supervisor. This in turn allows the estimating department to be more competitive since we can now calculate with greater accuracy how long the jobs actually take. This also led to the discovery of time theft being perpetrated by one of the employees. My advice to those who are looking for ways to save money is to work with Sherrell on how to find where the money is leaking from your business and be open to changing your current processes – even if the current processes appear to be working. Hiring Sherrell and her team is one of the best decisions I have made regarding the accounting and finances in my business.”



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