

WESTWIND RECOVERY RESIDENCES

STREAMLINING PROCESSES TO HELP SAVE TIME, MONEY AND HEADACHES

By taking over day-to-day bookkeeping for Westwind Recovery Residences, Supporting Strategies has enabled ownership to concentrate on business growth.

Client Profile

[Westwind Recovery Residences](#) aims to create a living experience that not only keeps guests clean and sober, but also offers them rewarding communal living as part of a larger family of thriving individuals. Founded in 2014, Westwind operates nine sober living residences in Los Angeles. The owners are also part of a group that launched Next Recovery, which operates five additional Los Angeles-area sober living homes, in 2016.

Streamlining Accounting Workflow

Supporting Strategies | Los Angeles started working

with Westwind in January 2016. The first priority was to set up systems and processes to help the

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Justin Wells, Co-Owner and Intake Coordinator at Westwind

business manage its accounting needs while also partnering with operations to instill structure and efficiency in its workflow.

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Previously, Westwind relied on a CPA from an accounting firm for its bookkeeping. The CPA provided an annual financial statement for tax purposes. However, Westwind wanted the accounting process to be directly integrated with operations and needed to analyze financial statements on a monthly basis to gain timelier insight into cash flow and evaluate the performance of each residence individually.

“As Westwind began to grow and really take off, it became clear that we could no longer run the business based on how much cash we had on hand,” says Justin Wells, Co-Owner and Intake Coordinator at Westwind. “We asked Supporting Strategies to create monthly financial reports, which allow us to spot problems before cash flow becomes an issue.”

Supporting Strategies now leverages QuickBooks Online to enable several process and system integrations and to deliver monthly financial statements for Westwind and Next Recovery.

In addition, Supporting Strategies has implemented a suite of integrated software tools to streamline accounting workflow and allow more time and attention to be spent on strategic initiatives.

Payroll processing is now done through a module integrated with the accounting software to eliminate redundant data entry and automate payroll tax collections and quarterly filings.

Accounts payable is now managed through an integrated online system, enabling staff at multiple locations to submit and approve vendor bills for payment and allowing Wells to release vendor

payments on time without needing to be in the office to sign and mail paper checks.

Document management is now 100% paperless, with a web and mobile application that stores receipts, invoices and bills for each residence and integrates with the accounts payable system.

Expense reporting is now managed through a web and mobile app that’s integrated with the core accounting software so that house managers at each location can easily categorize and report cash and credit card spending without delays or the data-entry errors that are inherent in this traditionally time-consuming, paper-based business process.

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Justin Wells, Co-Owner and Intake Coordinator at Westwind

Implementing a CRM Solution

Oftentimes Supporting Strategies is required to look beyond accounting and bookkeeping solutions to serve clients.

Wells had long wanted to collect certain data about residents at intake and throughout their stay, so the

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admissions team began relying on simple Microsoft Word documents emailed back and forth between team members. It was challenging for everyone involved to have the most current, complete set of information. Plus, there was no system to show whether someone checking in to a home had ever stayed with Westwind before. Prescription

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medications, insurance and other important information also fell into a black hole — and had to be captured anew for returning residents.

The Supporting Strategies team identified an opportunity to implement a CRM solution that will let Westwind and Next Recovery track residents more effectively and give all stakeholders real-time access to a shared resident database. The CRM also promises to reduce manual billing errors and streamline invoicing and expense reporting because it integrates directly with the accounting software.

“We are very excited to finish the implementation process of the new CRM and put it to the test,” says Wells.

A Team on His Side

Wells appreciates having a team of accounting and bookkeeping professionals looking out for his businesses. The Supporting Strategies workflow ensures that whenever Wells or one of his employees emails Supporting Strategies, the entire team receives the message and has access to all the systems and documentation to respond to the request and perform the necessary work. As a result, Wells and his team can confidently rely on Supporting Strategies to address all their requests in a punctual manner.

Between Westwind's expansion (two new residences in 2016) and the launch of Next Recovery, Wells has a lot on his plate. The Supporting Strategies team has freed him up to spend less time on bookkeeping and administrative functions and devote more time to higher-level responsibilities.

“I'm consistently amazed at how I can describe to Mark Wald [Supporting Strategies | Los Angeles Managing Director] an area in which I want to increase efficiency and he comes back with creative, simple solutions,” says Wells.

“The partnership between Supporting Strategies and Westwind has been an overwhelming success,” says Wald. “Westwind's owners routinely turn to our experienced team to identify and implement the most scalable systems and best-fit processes in support of their rapidly evolving business. We take ownership of continuously optimizing efficiency and maintaining proper controls while providing the management team with strategic insights and visibility to key metrics as they happen. Supporting Strategies | Los Angeles is proud to be an integral resource of Westwind's flourishing enterprise.”