CUSTOMER STORY

From Manual Reports to Automated Insights

“I think from my end, I would give it [FIgured] all an A+ and could see a lot of value that the Figured platform can give.”

Daniel Julson
Nadine Julson, LLC

THE FIRM

Name: Nadine Julson, LLC
Location: North Dakota, USA
Services: Accounting, Tax, Farm Advisory

THE FARMS

Type: Row Crop, Livestock
Location: Midwest, USA

Daniel Julson of Nadine Julson, LLC, a CPA firm established in 1997 in Wahpeton, North Dakota, specializes in accounting and advisory services for the agriculture industry.

With a full suite of services including tax preparation, bookkeeping, payroll, and business consulting, the firm is deeply invested in the financial health of its clients.

As certified QuickBooks ProAdvisors, they are also experts in navigating the QuickBooks ecosystem, a crucial capability as Daniel was in the midst of a major project to transition his clients from QuickBooks Desktop (QBD) to QuickBooks Online (QBO).

While most agricultural advisors were content delivering the same cookie-cutter reports their clients had always received, Daniel saw a different reality: farmers needed a strategic partnership, not just number-crunching.

His existing tools were designed for compliance, but his clients' success demanded insights that could reshape how they approached everything from cash flow to crop planning.

A Strategic Partnership for Real-World Results

Recognizing the need for a targeted approach, Daniel partnered with Figured on a simple, phased implementation. Starting with five existing clients, he was able to self-implement the platform and quickly realize its value firsthand.

He worked with the Figured team to establish an efficient workflow that he felt would help him scale his services. This initial success proved that the tool was not just a replacement for old processes, but a fundamental change in how his firm operates.

From Manual Tasks to Effortless Insights

After a year of implementation, Daniel found the reports to be *"super informative."* The platform's automation has streamlined his workflow to the point where, as he puts it,

"Once set up, the farm can run itself and he can simply check the progress of his reports."

This newfound efficiency frees him up to focus on what matters most: providing expert advice to his clients.

Contact Figured

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Unlocking New Value with Custom Reporting

The success of the initial rollout has prompted Daniel to explore the platform's new Beta of custom reporting. This feature has opened his eyes to a much broader potential for his business. His feedback highlights the product's ability to create value beyond its initial purpose:

> *"...I think that some of this reporting could expand Figured into something that isn't just farm accounting.*
>
> *This could serve a lot of non farm clients too which I think would be something I would like to use on entities that aren't just farms."*

Daniel's endorsement is a powerful testament to the software's value and his desire to fully leverage its capabilities. His experience proves that a tool designed for a specific niche, when implemented strategically, can transform a firm, unlocking new business opportunities and empowering it to evolve beyond its core services.

Daniel's journey is a powerful example of how the right technology, combined with a strategic approach, can not only solve today's challenges but also **unlock entirely new avenues for growth**.