



## Cape Coral Bookkeeping & Payroll

CASE STUDY

Growing bookkeeping company trusts Ooma Office to stay in touch with clients, and add new ones to its roster.

# Cape Coral

Bookkeeping & Payroll

Founded in 2001, Cape Coral Bookkeeping & Payroll operates on the belief that our customers' needs are of the utmost importance. Their entire team is committed to meeting those needs.

### The Challenges

When a new small business sets up shop in or around Cape Coral, Florida, Jane Wagner of Cape Coral Bookkeeping & Payroll is usually one of the first to reach out and welcome it to the community. At the same time, she takes the opportunity to offer up her company's bookkeeping services, which she runs out of her home.

Wagner previously had a traditional landline phone that she used to stay in touch with her clients. However, as she was recently planning to purchase a new home, she found out that she wouldn't be able to keep her old number, which would cause confusion for her clients and require extra effort to ensure they received her new contact information. "I conduct most of my business over the phone. In fact, I rarely meet my clients in person. There's simply no need. So when I was getting ready to move and found out that I wouldn't be able to keep my number, I started to look for alternatives," noted Wagner. "As a bookkeeper, I also keep a close eye on my own expenses, and I was spending more than \$125 a month on phone service. It was just too expensive."

“ Ooma Office does everything it promises to do, and then some. As a small business that services other small businesses in my area, I'm always recommending that they replace their traditional phone lines with Ooma Office. They never regret it. ”

– Jane Wagner

*Cape Coral Bookkeeping & Payroll*

### The Solution

Coincidentally, Wagner saw a commercial for Ooma and was prompted to look into Ooma Office. What she found was exactly what she needed for her business. "Everything about it was appealing. In my experience, you don't always get everything that a product offers, but with Ooma Office, I certainly got more than I expected," said Wagner.

Ooma Office helped Wagner in a number of ways. It was easy to set up, she gave her employees their own direct extensions and, most importantly, she was able to port her number so she could keep it when she moved. In fact, the Virtual Receptionist feature is like another employee for her – it can give callers the basic information they need in lieu of an administrative assistant.

### The Benefits

Ooma Office offers a range of benefits to Wagner and her company. She's saving more than \$90 per month, which she now invests into marketing to new businesses in her area. It's also put her in a good position to take advantage of the improving economy, and Wagner is forecasting 2015 to be a busy year for Cape Coral Bookkeeping & Payroll. "When you look around this region, you can see businesses popping up and empty office and commercial spaces becoming full again. There's a huge opportunity for my business that I refuse to let pass me by. I've never been more prepared to capitalize on the economic improvement here than I am now with Ooma Office," exclaimed Wagner.

Ooma serves diverse customers in a wide range of industries, including:

