



HOW A MULTI-OFFICE ACCOUNTING FIRM REDUCED HR RISK, STABILIZED BENEFITS COSTS, AND FREED PARTNERS TO FOCUS ON GROWTH

INDUSTRY

ACCOUNTING & PROFESSIONAL SERVICES



COMPANY PROFILE

Industry:

Public Accounting / Advisory

Locations:

Multi-state (remote + office-based)

Employees: ~40 employees (partners, CPAs, senior accountants, admin staff)

Ownership:

Partner-led firm

The Challenge



A growing accounting firm with multiple partners and offices was facing increasing **HR complexity, rising benefit costs, and growing compliance exposure**—all while trying to maintain profitability and retain top accounting talent.

Key challenges included:

- Partners acting as de facto HR managers, pulling time away from client work and business development
- Escalating healthcare renewals year over year with little transparency or negotiating leverage
- Multi-state compliance risk, including payroll taxes, PTO laws, and employee classification issues
- Outdated HR and payroll technology that failed to support remote staff and seasonal workloads
- Difficulty competing for talent against larger firms offering stronger benefits and better infrastructure

The firm knew something had to change—but they were unsure whether hiring internal HR staff, changing vendors, or moving to a PEO made sense.



The PEO Blueprint Approach



Rather than pushing a one-size-fits-all solution, **PEO Blueprint began with a strategic evaluation** to answer the most important question:

Is a PEO the right solution for this accounting firm—or not?

Step 1: Strategic Assessment

- PEO Blueprint conducted a full audit of:
 - Payroll, HR, and benefits costs
 - Healthcare renewal history and contribution strategy
 - Compliance exposure across all operating states
 - Partner time spent on HR administration
 - Technology gaps impacting productivity and employee experience

Step 2: Right-Fit PEO Selection

- Instead of defaulting to a large, generic PEO, PEO Blueprint identified PEOs that specialize in white-collar and professional services firms, with strengths in:
 - Accounting and financial services
 - Multi-state compliance support
 - High-wage, low-risk employee populations
 - Strong HR advisory and service models (not call-center driven)

Only a shortlist of best-fit PEOs was brought forward—saving partners time and avoiding unnecessary sales cycles.

Step 3: Negotiation & Optimization

- Leveraging deep industry and underwriting experience, PEO Blueprint negotiated:
 - Lower administrative fees aligned to market benchmarks
 - Improved healthcare plans with stabilized renewal risk
 - Contract terms favorable to a partner-led firm
 - Enhanced EPLI and compliance protections
 - A clear exit strategy if the firm outgrew the PEO model

The Results



Financial Impact

- **Healthcare cost stabilization** after years of double-digit increases
- **Immediate reduction** in HR and administrative burden
- **Lower long-term labor risk exposure**, especially across states



Operational Impact

- **Partners** reclaimed **dozens of hours per month** previously spent on HR issues
- **Centralized** HR, payroll, benefits, and compliance into a single platform
- **Improved** onboarding and offboarding for seasonal and remote staff



Talent & Culture Impact

- **Access to Fortune-500-level benefits** improved recruiting and retention
- **Employees gained mobile access** to pay stubs, benefits, W-2s, and HR support
- **The firm positioned** itself as a modern, competitive employer



Most importantly, partners were able to **refocus on clients, advisory services, and firm growth** –instead of HR administration.



Why This Matters for Accounting Firms



Accounting firms face unique pressures:

- High compliance expectations
- Tight margins
- Intense competition for talent
- Partners whose time is extremely valuable

This case demonstrates how the **right PEO—selected and negotiated correctly**—can act as a **force multiplier**, not just an outsourcing decision.

Key Takeaways



1

PEO is not just payroll

For accounting firms, the real value lies in compliance protection, benefits leverage, and partner time savings.

2

Not all PEOs are built for professional services

Industry specialization matters. The wrong PEO can create more friction than value.

3

Healthcare strategy is a major driver

Access to large-group plans through a PEO can stabilize costs and improve benefits simultaneously.

4

An independent PEO broker changes the outcome

Objective guidance, market access, and negotiation expertise directly impact results.



PEO BLUEPRINT

PEO Blueprint is an independent PEO brokerage and advisory firm helping accounting firms and other professional services organizations evaluate, select, and optimize PEO relationships.

Unlike direct sales reps, PEO Blueprint:

- Works across hundreds of PEOs
- Prioritizes fit before price
- Negotiates from inside-the-industry experience
- Acts as a long-term advisor—not a one-time transaction

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