
CLIENT SUCCESS STORY · NEARSHORE STAFFING

Nearshore Staffing Success

How a growing accounting firm cut staffing costs 45%, grew revenue 35%, and freed its leadership to work on the business instead of in it.

An accounting firm outgrowing its own capacity

Southwest Asset is a professional accounting and financial services firm founded by Dayna Govea, EA, MAcc. The company specializes in providing comprehensive bookkeeping, accounting, and tax services to businesses across various industries.

As a growing firm committed to delivering exceptional client service, Southwest Asset needed strategic solutions to scale their operations while maintaining the high-quality standards their clients expect.

Bookkeeping

Day-to-day financial record keeping for business clients.

Accounting

Full-service accounting across a range of industries.

Tax services

Compliance and filing work with seasonal peak demand.

LEADERSHIP LEGACY

Under the leadership of Ed Daugherty and the same experienced team that now leads JaxsonRiley, these results demonstrate our proven track record of delivering exceptional nearshore staffing solutions. The same expertise and commitment that enabled this remarkable transformation now drives our mission to help organizations that do good do better.

Client demand outpacing internal resources

Southwest Asset faced significant operational challenges that required strategic staffing support. As a growing accounting and financial services firm, increasing client demand was straining internal resources and limiting their ability to focus on strategic business development. The company needed qualified accounting professionals who could integrate seamlessly with their existing team while providing the operational capacity necessary for sustainable growth.

Leadership required a solution that would eliminate employee burnout while creating opportunities for business development and strategic planning.

THE PRIMARY CHALLENGES INCLUDED

Seasonal workload fluctuations

Managing seasonal workload fluctuations across the firm's calendar.

Service quality at peak

Maintaining service quality during peak periods.

On the business, not in it

Enabling leadership to work on the business rather than in it.

Seamless integration

Qualified accounting professionals who could integrate seamlessly with their existing team.

A bilingual nearshore team, fully integrated

Our team developed a comprehensive nearshore staffing strategy specifically tailored to Southwest Asset's needs in the accounting and financial services sector. We provided skilled bilingual professionals from Central America who seamlessly integrated with their existing team structure.

OUR NEARSHORE SOLUTION INCLUDED

- 01** Qualified accounting professionals with experience in U.S. accounting standards and practices
- 02** Bilingual capabilities enabling direct client communication when needed
- 03** Flexible staffing model that could scale with seasonal demands
- 04** Comprehensive training and integration to ensure seamless workflow continuity
- 05** Cost-effective pricing structure that delivered immediate operational savings

The nearshore team was carefully selected to complement Southwest Asset's existing capabilities while providing the additional capacity needed to support growth objectives.

Results across the whole business

The partnership between our team and Southwest Asset has delivered remarkable results across multiple business metrics:

BUSINESS GROWTH

35%

increase in revenue

25%

expansion in client base

OPERATIONAL EXCELLENCE

12%

reduction in errors and rework

60%

more leadership time on strategic planning

**Enhanced
work-life
balance**

across the internal team

FINANCIAL PERFORMANCE

45%

reduction in staffing costs

30%

improvement in profit margins

From capacity-constrained to strategically focused

This comprehensive nearshore solution transformed Southwest Asset from a capacity-constrained firm into a strategically-focused organization positioned for sustainable growth, demonstrating how the right staffing partnership can simultaneously reduce costs and fuel business expansion.

BEFORE

Client demand straining internal resources, quality pressure at peak periods, and leadership pulled into day-to-day delivery.

AFTER

Flexible capacity that scales with the season, lower costs, stronger margins, and leadership time returned to strategy.

WHY NEARSHORE WORKED HERE

Cost reduction and growth usually pull against each other. A bilingual nearshore team with experience in U.S. accounting standards and practices delivered both at once — capacity that flexes with tax season, without the fixed overhead of year-round headcount.

Inspired by this success story?

Whether you're scaling a team, filling a hard role, or standing up a program from scratch, we're glad to talk it through. Get in touch to start your journey toward outstanding results.



Ed Daugherty

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