



“A client came to us as their current accountant did not have the time to dedicate to their reporting and growth. They needed help to move off of current systems.

After initial meetings we understood what the client wanted on a monthly basis. We started the ball rolling and moved them to a cloud based accounting system, which therefore helped them with access from multi sites and saved them money from their current desktop provider which was substantially outdated.

This particular client had no idea on how their business was performing and based their current performance on cash at bank. This wasn't always the best indicator as their sales were factored through an invoice financing company. They would often have to wait for their statutory accounts to be prepared which

We introduced the client to Autorecognition software for the purchase invoices, which saved the lady that looked after their admin around 10 hours per week on processing.

After analysing their invoice financing procedures and fees, we moved them over to another provider who were significantly cheaper and allowed better reporting that enabled their accounts to be up to date significantly quicker.

After introducing monthly management reporting we had regular conversations with the directors and enabled them to reduce their staff level by 5 people. Which was a significant saving in salaries. We were also able to advise the directors on the best way for them to withdraw funds from the business as they had losses which meant they were unable to vote dividends.

We then introduced a stock management & CRM software system that had a direct integration with their accounting package. This again has saved several hours in the business from sales staff inputting client data, to the administration team pushing through to Xero. It allowed their stock value to be pushed through to their accounting software which removed the need for a regular stocktake to update their spreadsheet stock values.

After 12 months of software changes and regular management reporting, the client has been able to significantly reduce admin hours and also reduce their costs. The allowed them to turn a profit and enabled them to vote dividends for both shareholders within the year which they were very pleased about.”

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