sage

Moving to the cloud pays off for Freedom Accounting Inc.

Sage Business Cloud Accounting and AutoEntry close the books on paper—and poise the firm for growth

Self-proclaimed "Sage office" Freedom Accounting Inc. offers bookkeeping, accounting, and tax preparation services to small and medium-sized businesses in Victoria. Hindered by paper-based inefficiencies, they looked to automation and the cloud to streamline processes, enhance service, and grow their business.

Key outcomes:
- Business set to take on new clients and move into new markets.
- Efficiency up 20% and projected to climb to 30-35%.
- Real-time account visibility means staff and clients have more control and can be more proactive.
- AutoEntry reduces paper, data entry, and back-and-forth between staff and clients.
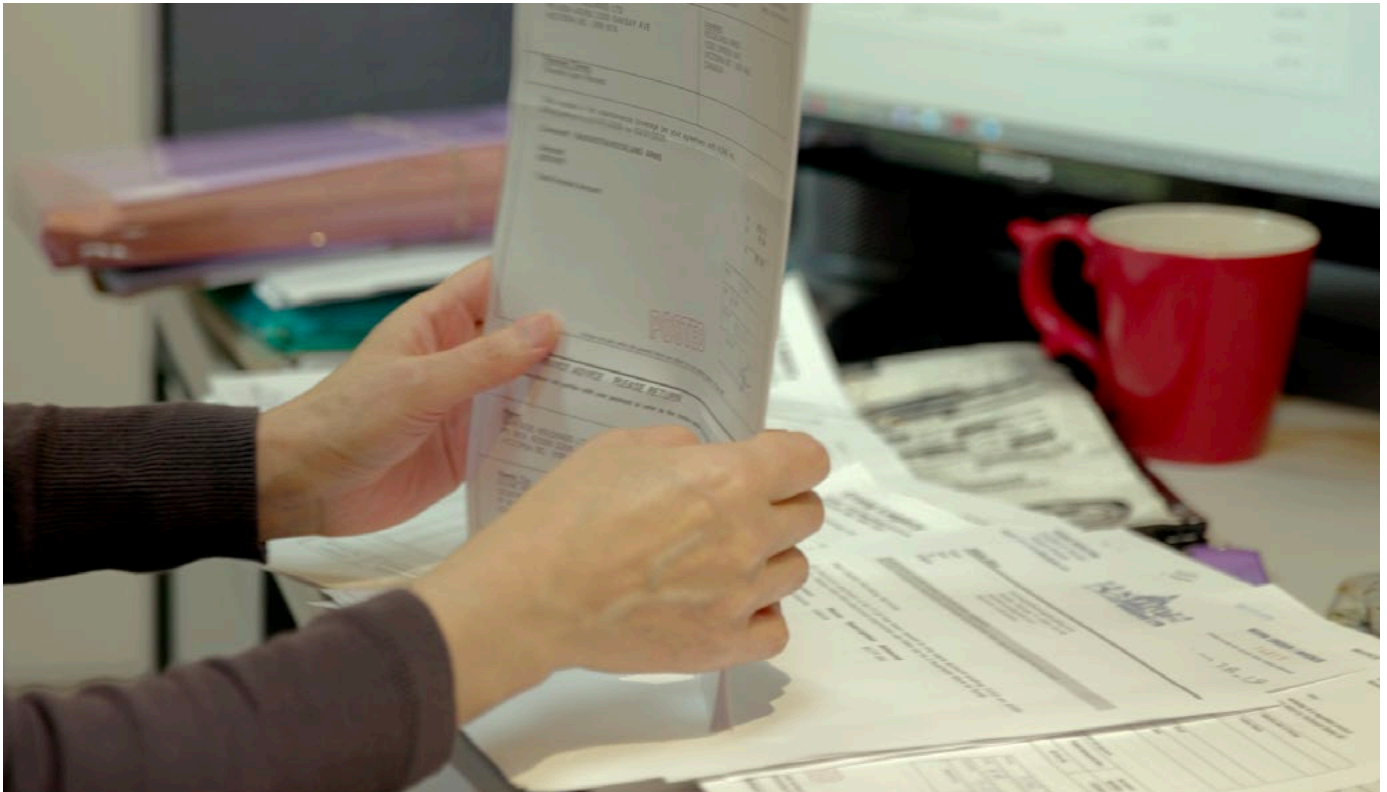- Mobile access frees employees to work remotely.

FREEDOM ACCOUNTING
INC
Give us your books – take back your life!®

Company
Freedom Accounting Inc.

Location
British Columbia, Canada

Industry
Accountants and Bookkeeping

Solution
Sage Business Cloud Accounting and AutoEntry

For more info, visit:
www.sage.com

Sage Business Cloud Accounting helped Freedom Accounting Inc. say goodbye to paper-based inefficiencies.

"Inefficiency is huge in our industry. We're all used to dealing with boxes and boxes of paper. We wanted a solution that was going to deal with that so we can grow."
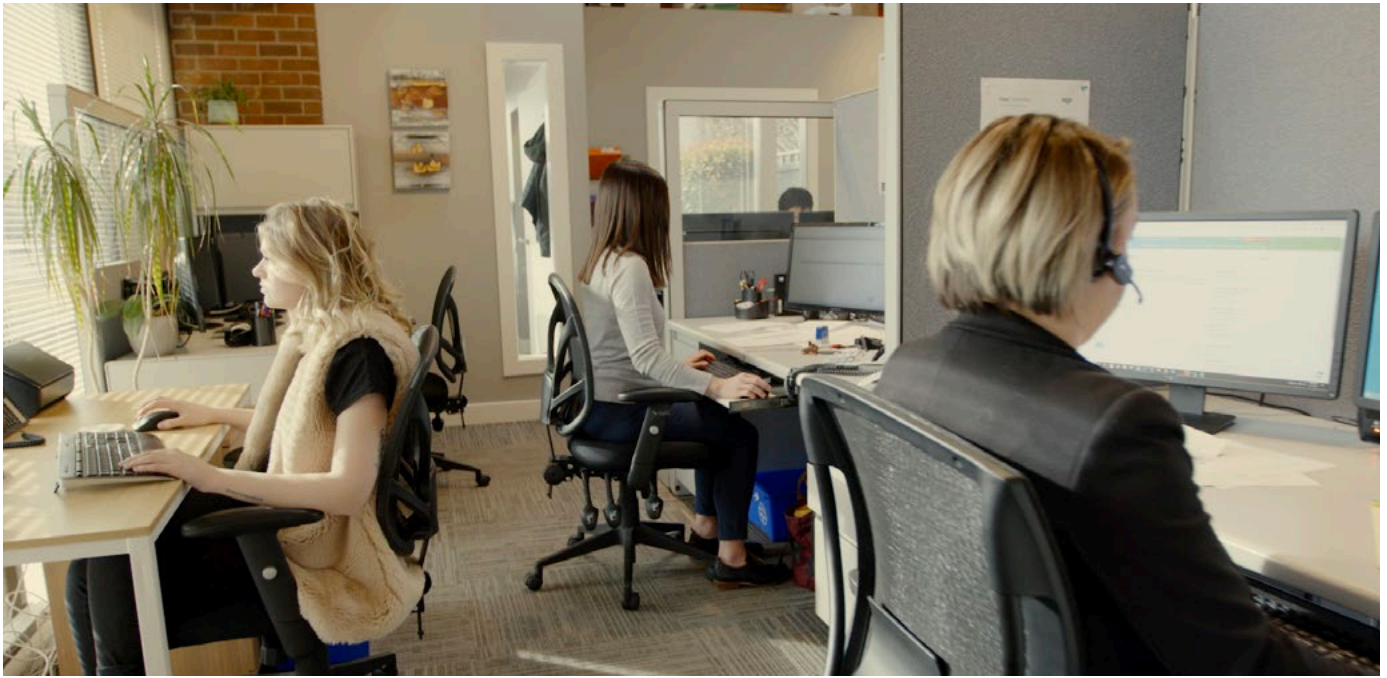
Colleen Hoggarth, Freedom Accounting Inc.

Paper-based inefficiencies

Since purchasing her business in 2012, Colleen Hoggarth has grown Freedom Accounting Inc. to 15 team members at two locations in Victoria and nearby Shawnigan Lake. With plans to reach neighbouring markets and beyond, Hoggarth wanted to ramp up efficiency.

Before migrating to Sage Accounting, Freedom Accounting Inc. offices were filled to the brim with their clients' financial paperwork: reams of bank and credit card statements, stacks of receipts for manual data entry, invoices, bills, and more. Hoggarth and her staff did their best to simplify work for everyone, but the process remained labour intensive, prone to breakdown—and no workaround diminished the endless influx of paper.

"So much inefficiency was caused by the paper our clients had to bring in to us every month," Hoggarth explains. "As much as we simplified the process, it was difficult to get clients to actually come in and drop it off. We also dreaded asking them to return records, just to dig through piles of paper to find one missing receipt."

Converting desktop clients to the cloud is a simple, seamless process with Sage Business Cloud Accounting.

Automation and AutoEntry

Freedom Accounting Inc. was ready to grow, but needed to shed its dependence on paper, streamline processes, and create more flexibility and convenience for both staff and clients. Hoggarth chose Sage Accounting—along with add-on AutoEntry—to overcome her business' paper-based inefficiencies.

For Hoggarth, industry leader Sage was a natural next step to growth:

"Sage Business Cloud Accounting embodied everything our desktop solution has, with the flexibility of a cloud service and automation. We wanted this for our clients badly."

Colleen Hoggarth, Freedom Accounting Inc.

Sage Accounting enables real-time access to account information anytime, anywhere.

"It's a better way of doing business for both our clients and ourselves," Hoggarth shares. "Now, clients feel like they're in control of their business. They're able to recognize when they're hitting a roadblock, and we're able to help them look through cash flows to see if there's a way to avoid it in the future."

Freedom Accounting Inc. also put a ceremonious end to its paper parade with AutoEntry, a Sage document management tool that extracts and processes bills, invoices, expenses, and receipts—integrating them all seamlessly into the accounting software.

"Clients can now take a picture of a receipt and it's uploaded automatically into the system, and we no longer need the real estate to hold all of those boxes of paper."

sage

Freedom Accounting Inc. reaches beyond their market for business— and top talent, thanks to Sage Business Cloud Accounting.

"Sage Business Cloud Accounting has given us a more tech-forward way of doing business. Clients can work on their smartphones, and we can have team members not physically located in an office."

Colleen Hoggarth, Freedom Accounting Inc.

Poised for growth

Sage Accounting and AutoEntry have empowered Freedom Accounting Inc. to streamline processes, enhance service, and grow their business.

Business efficiency has climbed 20%, and as more books convert, that number is projected to reach 30-35%.

Real-time access to financial information offers staff and clients more control, and the ability to be more strategic with accounts.

AutoEntry eliminates the need for rote data entry, weekly client visits, and the endless influx of paper.

Time savings, new efficiencies, and telecommuting allow the business to expand without adding real estate or staff.

The cloud frees staff to work remotely—and Freedom Accounting Inc. to expand virtually into unlimited new markets.

Efficiencies gained with Sage Business Cloud Accounting have enabled Freedom Accounting Inc. to expand their client roster.

"Sage Business Cloud Accounting has enabled us to expand our business without taking on more real estate or more team members."

Colleen Hoggarth, Freedom Accounting Inc.

Ready to take on more clients

With staff now able to work remotely, Freedom Accounting Inc. is expanding to neighbouring markets—and beyond.

And, with business efficiency climbing, Hoggarth's people are focusing more strategically on their accounts. "The client absolutely sees that we can become more of an advisor to them. A bookkeeper is no longer just a person entering numbers into a software program. They're a part of the team that helps a small business thrive."

About Sage Business Cloud Accounting and AutoEntry

Sage Business Cloud Accounting is a powerful cloud accounting solution ideal for small businesses, with support for invoicing, cash flow management, and accrual entries. AutoEntry is an intelligent, cloud-based solution which eliminates bookkeeping data entry, so users never have to type up invoices or receipts. AutoEntry integrates seamlessly with Sage Business Cloud Accounting and is available as both a web and mobile app.

sage