



“ QuickBooks Online is certainly the core product that we offer. It’s easy to access, easy to understand and easy to use.

- Paul Lodder, Partner
Sagars, Leeds

CASE STUDY

QuickBooks has supported us every step of the way

Setting up a cloud specialist team has helped us to segment and move our clients to the cloud

Paul Lodder describes Sagars as a trusted adviser. ‘Our clients can rely on us to support them with whatever challenges they face’. With plenty of long-term business relationships and a reputation for top technical advice, the 90-strong company are well positioned to encourage the shift to cloud accounting. ‘All of our cloud team do demo’s,’ says Paul. ‘It’s a chance to show clients the benefits of using the software and to say “we want to work with you!”. Sagars’ team are all committed to the cloud and are keen to show what a positive difference QuickBooks Online can make to clients.’

‘There’s been a lot of enthusiasm and passion about using QuickBooks Online. We’ve banned Excel and have a cloud team of 27 concentrating on getting people on board.’

Of course, those benefits aren’t limited to the client. Sagars save time and money on their recurring bookkeeping jobs thanks to automated data processing. And local businesses affiliated to QuickBooks have made new connections with Sagars through the Find-an-Accountant Directory.

‘We’ve had 10 new clients in last 6 months through the Find-an-Accountant Directory which is fantastic. There are so many benefits and absolutely nothing to lose. It’s a no brainer.’

With Making Tax Digital on the horizon, Sagars have created a video, supported by QuickBooks, as an innovative way to communicate to clients how important it is to move to cloud accounting. The key message? ‘Do It Now’. In addition they have undertaken a segmentation exercise to identify the needs, requirements and options of their 3,500 or so clients.

‘Since we started using QuickBooks Online we’ve enhanced relationships with local professional contacts, grown our team and established ourselves as cloud leaders.’

