



## CLIENT SUCCESS STORY

How a UK-based small accounting firm implemented automation to serve 60+ clients seamlessly

### BEFORE ACCOUNTIFI

Our client worked with 60+ businesses across industries such as SAAS, F&B, oil & natural gas, wealth management, cosmetics, etc. with a total revenue of GBP 3 million.

Every month, they were required to collect details of clients' financial transactions (in Excel or a software preferred by client), update the books, prepare financial statements, file VAT return, and also process payroll.

The process was inefficient and time-consuming, not to mention the fact that manual creation of reports left quite a bit of room for inaccuracies.

### AFTER ACCOUNTIFI

- We understood the firm's processes and identified the repetitive manual tasks that led to inefficiencies
- Implemented software bots to automate the following
  - Following up with clients for information
  - Gathering data from various sources
  - Compiling data into reports
  - Filing VAT every month
  - Process payroll
- The implemented bots were product-agnostic. That is, they could shake hands and work with any of the typical software used by clients such as Quickbooks, Sage, Xero, Zoho Books, etc.

EXPERIENCE A FREE, NO-STRINGS-ATTACHED TRIAL OF OUR AUTOMATION SERVICE.

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### AT A GLANCE

#### Challenges

- Tiresome work of following up with 60+ clients
- Client financial details not received on time
- Multiple accounting technologies to navigate

#### Benefits

- Automated more than 5 business processes
- Up to 30x faster service
- Thousands of pounds saved in hiring
- Error-free and timely reports



“Accountifi team really understands the business and goes beyond bookkeeping. For example, our clients were not giving us the right information. Accountifi asked the right questions, collected the information and helped us complete the accounting process & submit the VAT returns at the earliest.”

#### Founder & CEO

UK-based accounting firm