

Customer Success Story

Flow Works champions people-first accounting

Using **Sage for Accountants tools**, a small bookkeeping firm streamlined workflows, simplified audits, and reclaimed time to focus on what truly matters—in business and beyond



Sage



Flow Works Bookkeeping and Consulting

Big change starts with small actions

Flow Works Bookkeeping and Consulting is deeply embedded in its local community. Founder Sara Gibb has built close relationships with many local businesses, treating her clients like family and championing their success as if it were her own.

Over the past decade, the firm has grown steadily, along with the complexity of its work. But for Sara, it was never just about growth. She wanted time to lead strategically, serve her clients better, and still be present at home.

Manual processes like matching receipts to statements had become increasingly troublesome. “I would come home and manually process everything,” Sara recalls. “Take the receipts and match them to the bank statement.” The time added up—so did the miles.

Sara often found herself driving between clients, picking up documents, or dropping off paperwork. It was inefficient and exhausting.

She needed a solution that could help her eliminate repetitive admin, reduce unnecessary travel, and deliver more value to her clients. The right technology would mean more than convenience, it would unlock freedom, both professionally and personally. That’s where Sage for Accountants and its suite of tools came in.

Company	Location	Industry	Sage products
Flow Works Bookkeeping and Consulting	British Columbia, Canada	Accountants and Bookkeeping	Sage Accounting, AutoEntry by Sage, Sage Payroll



Turning automation into opportunity

The time saved allowed Sara to shift her focus from chasing paperwork to helping her clients plan ahead. “We’re not constantly looking for information anymore,” she says. “It’s just there when we need it.”

That visibility has transformed how she supports her clients. Whether it’s spotting issues early, responding to questions in real time, or pulling documentation instantly, Sara is now in a position to offer more proactive, personalized advice.

Her transformation reflects a broader trend. According to the **Practice of Now report from Sage**, 77% of firms say they now use automation across more than half their workflows. This is helping professionals move away from manual work and focus more on delivering insight and value.



1-2 hours

saved per client with AutoEntry handling processing

Up to three clients

processed in under **2 hours**

“ Sage Accounting offers more than just bookkeeping. It’s a powerful database that makes finding things so much easier. ”



Sara Gibb
Founder, Flow Works Bookkeeping and Consulting

Imported Transactions

Review your statement lines from your bank then match, create or transfer transactions into Sage Accounting.

Switch Account
CitiBank Account ▼
12-12-34 | 12345678

Transactions:	Last update from bank:	Bank balance	Sage balance
2	45 mins ago	\$3,465.56	\$1,234.56

Match For Reference

Thu, April 05 \$2,000.00 **Create** Select a contact ▼ REF123 \$2,000.00 ↻ **Create**

Atkin Bakers What* Tax Rate*
8200 - General Expenses ▼ 12.00% - Standard ▼

Transfer

Match For Reference

Thu, April 05 \$500.00 **Create** Select a contact ▼ REF123 \$500.00 ↻ **Create**

Atkin Bakers What* Tax Rate*
8200 - General Expenses ▼ 12.00% - Standard ▼

Transfer





88%

reduction in time
spent on a client's bank
reconciliations with
Sage Accounting

Sage

Flow Works Bookkeeping and Consulting

Ease today, freedom tomorrow

With routine tasks handled by automation, Sara is free to focus on higher-value work. “Now I can easily dig for what I need,” she explains. “I can just download a copy and upload it to the Canada Revenue Agency (CRA) for audit, which is nice!”

Her time is no longer tied up in physical paperwork or last-minute requests. When clients need documentation, she can respond instantly. “There’s nothing worse than getting an audit and having to dig through three years’ worth of gas. Now I just type in the name of the gas company and I can find the receipt.”

These efficiencies don’t just benefit her clients. They’ve given Sara breathing room and the chance to enjoy the life she’s built. “Sometimes I’ll sit here with my coffee and just start processing receipts,” she says. “It’s one of my favourite things.”

Built for what's next

Sara's move to Sage meant more than just improving operations. It helped her reclaim control over her time, her business, and her role as a trusted advisor to her clients.

By utilizing the tools in Sage for Accountants, Flow Works has moved from paper to digital, from reactive to proactive, and from overloaded to agile. The change has made her work more strategic, more resilient, and more rewarding. "I don't think I could have created this life if I hadn't gone fully digital," she says.

It's a story that reflects the broader future of accounting. 21% of accountants would describe their current work as human or personal, and 89% say that automating processes would make a real difference*. Firms like Flow Works are showing what's possible, one receipt at a time.

*Statistics sourced from the [Practice of Now report by Sage](#).



“Freedom, to me, looks like opening my laptop to do a little work with Sage Accounting, then closing it and seeing the world. That’s what I’m most looking forward to, being able to work and travel at the same time.”



Sara Gibb
Founder, Flow Works Bookkeeping and Consulting



sage.com/ca/accountants



Sage

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