

Success Story

Accrual World finds work/life balance with Sage Accounting

Sage Accounting helps streamline processes and deliver efficiencies for a one-woman accountancy practice



Founded in 2020, Accrual World has enabled chartered certified accountant Donna Hannaby to work in a way that suits her. With more than 20 years experience in general practice, Donna aims to achieve the best results for her clients using the right technology, helping them refine processes and create efficiencies.

Key outcomes

- Streamlined workflows and increased efficiencies
- One day per week saved on data entry with AutoEntry
- More effective and proactive workload planning
- Increased flexibility and improved work/life balance
- Time saved with new clients onboarded directly onto the cloud

Company
Accrual World

Location
United Kingdom

Industry
Accounting & Bookkeeping

Sage Products
Sage Accounting and AutoEntry



About Accrual World

Accrual World works with all business types, from sole traders to large companies, and offers services including bookkeeping, VAT, tax, payroll and compliance.

Sage



Going with Sage as the first choice

The driving force behind setting up a new practice on her own was to be able to work when and how she wanted. “Sage Accounting offers me the flexibility and reliability I need to work in my own way. I need to fit work around my family life, not the other way around,” says Donna Hannaby, Director of Accrual World.

As both a cloud accountancy practice and a one-person operation, having a reliable technology foundation and support network is crucial. Donna knew she needed to choose a solution that would provide value for money and be simple enough that she didn't need to spend hours configuring it on her own. Having worked extensively with Sage in a previous role and having a strong existing relationship with her Practice Success Manager, Wendy Lynch, Donna could trust Sage Accounting to support her business. “Wendy has always been there to answer my questions, so that relationship was an important part of my decision to go with Sage,” says Donna.

Implementation was simple enough that Donna was able to complete most of the setup in her spare time. It was important to get it right because any delays or technical difficulties would impact the practice's ability to bring in any income. “As I worked my notice period, I spent my spare time working with the Sage team to get everything set up exactly how I wanted it; when the day finally came, I was able to hit the ground running,” says Donna.

Learning on the go

The ongoing support from Sage really helped the fledgling find its feet and adapt to new challenges, providing assistance in setting up Sage Accounting and streamlining workflows. Donna's dedicated Practice Success Manager and the Sage Enablement team are on hand to problem solve whenever they are needed. “When reverse charge VAT changes came in, my construction clients were impacted. I needed a way to do quick entries and working with my Practice Success Manager and the Sage Enablement team, I was shown the best way to do it within Sage Accounting,” Donna explains.

For Donna, this not only allowed her to deliver better services to her clients but showed that, as a customer, she can help drive improvements in the solutions she uses. With a variety of free Sage learning materials available at her fingertips, Donna also has the resources and support she needs to keep building her skills. From bitesize videos to more formal modules with Sage University, Donna has been able to gain Sage accreditation in a way that fits her life. “I love the Sage University Live events. It was exciting learning about the new software, and it made me passionate about trying something new,” she explains.



Hours are saved every week thanks to Sage Accounting.

Achieving more in less time

The cloud and automation advantages that Sage Accounting provides allows Donna to work without the overheads that would come from having an office and travelling to meet clients.

Onboarding new clients is quick and easy through Sage Business Cloud Partner Edition by adding new units, and AutoEntry has helped her streamline her own, and her clients' processes. "The first thing I do every day is log on to Sage Accounting and AutoEntry and get any bank transactions, invoices and bank statements going straight away. After looking at the Sage Accounting dashboards and dealing directly with any queries, I have usually taken care of the more manual daily stuff in an hour or two. This means I can dig into the figures and start working constructively with my clients," says Donna.

Donna also saves hours every week through the automated bank feed feature within Sage Accounting connects to clients' bank entries. Monthly or quarterly, the streamlined process of pulling all the data together and creating reports drives more time savings, as does the simplified process of updating creditors and debtors. Altogether, the solutions Sage Accounting offers has saved Donna around a day a week.

Increased visibility delivers proactive support

As Accrual World began winning more clients, Donna has benefitted from the increased visibility that Sage Accounting delivers. This insight helps her offer a more responsive service to her clients, anticipate their needs, and proactively problem solve.

"I recently noticed on AutoEntry that one of my clients hadn't uploaded any invoices for a while, but I could see in Sage Accounting that they were still making transactions. I sent them a quick message, and it turned out that their scanner was broken. What could have turned into a big backlog of work got sorted out then and there," says Donna.

As her clients become more proficient at using Sage Accounting and AutoEntry, so, in turn, Donna has become more efficient. With clients uploading documents automatically, she can better plan her workload - reinforcing her ability to work when and how she wants, to suit her day. This is most evident when it comes to VAT processing. "I don't need to block out several weeks for VAT returns anymore because clients upload their data throughout the year with Sage Accounting, so I can process everything when it works for me, and still ensure I hit the deadlines accurately," Donna explains.



“Sage has been with me since the start, so understands my vision, and as I continue to grow Accrual World, I know I’ll be implementing more Sage solutions.”

Donna Hannaby

Director, Accrual World

Award winning partnership

As part of her Sage relationship, Donna was invited to become a Sage Champion. This is an exclusive community where like-minded Sage customers can network and provide feedback on how to improve products and services. “It makes you feel valued as a customer, but also that you are contributing to making the products you rely on even better.”

Sage also awarded the coveted New Practice of the Year trophy to Accrual World at its annual Sage Impact Awards, something that Donna feels very proud to have received. “It is great to have my hard work recognised and celebrated. Starting up a practice is a huge step; deciding to take on that challenge during a global pandemic is an even bigger one. My client’s being happy with the service I provide is all the validation I need, but this is the cherry on the cake.”

Going forward, Donna is keen to expand her capabilities to take on more accounting and tax services. “I just want to go for it,” she says. “Sage has been with me since the start, so understands my vision, and as I continue to grow Accrual World, I know I’ll be implementing more Sage solutions.”



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