

Success Story

130 years strong, and still ahead of the curve

Yorkshire accountancy firm Walter Dawson & Son turned lost time into time well spent

“Sage have been fantastic for Walter Dawson. They’ve been with us throughout our business cloud journey.”

Julie Young

Managing Director, Walter Dawson & Son



The challenge

Manual processes and retrospective reporting slowed the firm’s ability to offer timely advice or prepare clients for digital compliance.



The solution

Walter Dawson embraced cloud tools from Sage to modernise operations, strengthen client relationships, and refocus on future-ready support.



Results with Sage Accounting

The firm increased efficiency, improved responsiveness, and gave its people more time to do what they do best.

- A decade of sustained growth, powered by Sage in the cloud.
- Time savings redirected into customer care.
- Stronger relationships built on shared insight.
- Early progress on MTD for Income Tax.

Company

Walter Dawson & Son

Location

United Kingdom

Industry

Accountants and Bookkeeping

Sage Products

Sage Accounting, AutoEntry by Sage



WALTER DAWSON & SON

About Walter Dawson & Son

A family-founded accountancy firm based in Yorkshire, supporting SMEs since 1886 and built on trust, care, and long-standing relationships.



A legacy written on paper

Walter Dawson & Son's prestigious heritage in accounting and bookkeeping has been part of the fabric of Yorkshire for over a century. But until the mid-2010s, inside the firm, little had changed. "Everything we did was paper," says Julie Young, Managing Director. "People's records came in physically. They had cash books that had to be analysed and added up. Our working files were all paper-based."

Over time, that paperwork took a toll. "You're always acting reactively," she explains. "It slowed our progress. It slowed how often we could speak to customers." Client Manager Brandon Conway remembers how draining it was. "You had people sat behind screens, tapping away. You're the engine, essentially. Did you even go home?"

Despite their dedication, the team felt behind. There was pride in the excellent work, but never quite enough time to give everyone what they needed. What they wanted to do was use their expertise to make a genuine difference to their clients' lives; to turn the numbers into meaningful, personal, real-world guidance. When Making Tax Digital for VAT entered the conversation in 2015, it was the spark they needed. "We knew we had to do something," Julie says, "not only internally, but for our clients."

Choosing progress, not comfort

Walter Dawson could have stuck with what it knew. Instead, it leaned into change.

"Sage were fantastic," says Julie. "They came to see Walter Dawson. They talked about upcoming products... they knew the challenges that accountants and clients were facing with moving to a digital era."

The firm introduced Sage cloud solutions gradually, with hands-on training across their offices and roadshows for clients. "The implementation of Sage was, let's say, fun," Julie laughs. "I got to go around the offices and bring people together. For clients, we couldn't train them all one by one, so Sage joined us on the road."

Not everyone took to it at first. "Clients were standoffish," Brandon says. "They preferred what they were used to." But over time, even the most hesitant came around. Julie shares, "Some of our elderly clients, who you thought would really fear using technology, have embraced this the most."



With Sage, the firm moved from reactive tasks to proactive insight.

Turning time into trust

Some of the biggest breakthroughs came from the smallest changes. “It may sound small,” Julie says, “but the biggest impact we felt for us and our clients was bank feeds. That meant that the information was straight in the software, able to be processed right away.”

But it wasn’t just about going faster. It was about what they could do with the time they gained. “It gives us that time to give back,” Julie says. “We can reflect on the information we’re producing, understand performance, and actually talk to people about how they’re doing.”

Brandon sees the difference in the day-to-day. “I can be in with a business owner, open the laptop, and get instant access to what I need there and then.” He adds, “Before, it could take two weeks. Now I can pretty much instantly pick up the phone and give them the answer they need.”

Clarity creates connection

That shift from historical bookkeeping to proactive guidance changed everything. “The abilities we have now mean we can support people to make the decisions they need to make when they need to make them,” says Julie.

It’s not just about numbers, but moments. “We want to offer advice that’s meaningful,” she explains. “Should they invest in machinery? Put money into a pension? Are their costs escalating?”

Brandon sees how much that guidance matters. “Being a trusted advisor is a heavy weight to carry. But if we take on that burden, clients can focus on what they need to do. They put their eggs in our basket. We don’t take that lightly.”

Looking ahead, together

After ten years partnered with Sage, the team isn’t slowing down. The next chapter is already underway, with the firm looking ahead to Making Tax Digital for Income Tax.

“We’ve already started the journey,” Julie says. “We felt the need to get ahead of the curve and wanted to start as soon as we could.”

Walter Dawson & Son has joined HMRC’s beta programme for MTD for Income Tax, using Sage to prepare clients early. “Today, the big takeaway with income tax is we need to start doing something now. We can’t wait until the deadline,” Julie explains. “We want to help our clients get there first.”



“It’s not about the tech—it’s about what the tech gives us back. Time, trust and connection.”

Julie Young

Managing Director, Walter Dawson & Son

People, not paperwork

Progress has never been about shiny tech. It’s been about what it makes possible. Julie’s stance on automation is clear. “AI and automation can be scary words,” she says. “But one of the phrases the team always hears me say is: bring it on.” She adds, “It’s there to help us. It’s there to make us more efficient. And it’s there to give us back time so we can spend it with our clients, and do what we do best.”

With the whole team on board, collaboration is easier too. “All our team have access to Sage,” Brandon says. “They can all complete any job. We can all see who’s made adjustments when and where. That allows me, sitting on the other side being review-wise, to ask why something’s been done. That accountability makes us stronger.”

The change at Walter Dawson was more than just digital, it was cultural. From the way they meet with clients to the way they plan ahead, everything feels clearer, calmer, and more connected. “Sage have been fantastic,” says Julie. “They listened to our challenges. We feel heard.”



Sage

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