

## SUCCESS STORY

# Accounting and consulting firm catapults growth with automation

*ZTX Advisors uses AutoEntry  
to grow its own business and  
that of its clients*



ZTX Advisors is a small accounting firm specializing in tax preparation and bookkeeping. It was founded in July 2017 with the primary purpose of helping small and online businesses understand their financials and grow their businesses. AutoEntry is helping ZTX save valuable time that not only improves the quality of the work it produces for its clients, but also the quantity of clients it can help by taking on more clients with the same resources.

### Key outcomes:

- Reduced data entry hours by 75%
- Accelerated delivery of client services
- Increased revenue by 10x (due to increased billable hours)
- Grew client base by 60% (due to increased capacity)



Company

**ZTX Advisors**

Location

**Texas, US**

Industry

**Accountants and Bookkeeping**

Solution

**AutoEntry**

For more info, visit:

[sage.com/en-us/accountants/  
products/autoentry/](https://sage.com/en-us/accountants/products/autoentry/)



*ZTX Advisors says its partnership-focused relationship with clients sets it apart.*

## “AutoEntry was a complete game changer for my firm.”

Jose Zavala, CEO and Founder, ZTX Advisors

### **Why Auto Entry**

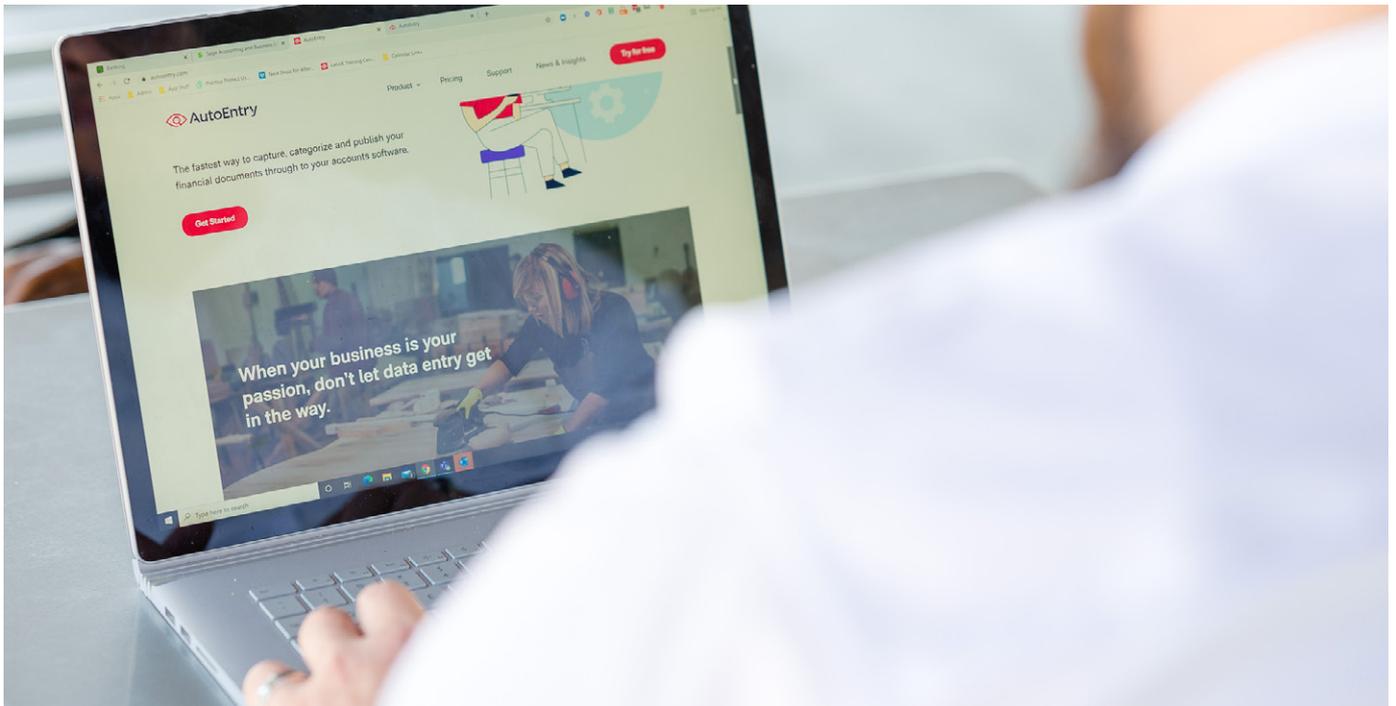
Jose Zavala, founder of ZTX Advisors, still remembers the moment he switched to AutoEntry. A client needed account clean-up and had a large number of unrecorded transactions across three credit cards and three bank accounts. The “old” way meant manually typing each individual transaction into the client’s accounting software.

“Once we started using AutoEntry we were able to reduce this type of account clean-up from a week to about eight hours, which is huge. So those other days that I had, I was able to sell more, do more tax returns, revenue went up. It was great. It was tremendous.” The app saved Jose’s firm so much time, he never looked back.

### **The Benefits of AutoEntry**

The time Jose saved on that client proved the rule rather than the exception. Since then, ZTX Advisors has seen a 75% reduction in the time it previously spent on manual entry. This time not only allows ZTX to provide faster turnaround for its clients, but also more time to focus on billable services, take on new clients, and grow its practice.

“The reason that the time savings is very important is twofold. The first is, of course, savings—time savings, human capital savings. You’re able to focus your team on something else that could have higher value. But the second is more about how I can focus on the strategy sessions and the growth services we offer our clients,” says Jose.



Jose Zavala says AutoEntry's drag-and-drop features are user-friendly.

**“The biggest driver for me is seeing a client take that deep breath, knowing that everything is taken care of.”**

Jose Zavala, CEO and Founder, ZTX Advisors

#### **Empowering Better Service**

While the personal benefits to the company are welcomed, ZTX takes pride in the aid it can bring to its customers—small business owners who need to spend time running and growing their own businesses and not worrying about their financials hanging overhead. The money Jose and his team save them goes a long way toward meeting this goal.

“I am very proud of what I’ve been able to do and the impact I’ve been able to make. I’ve had a lot of my clients save 30, 40, \$50,000 in taxes and be able to invest that back into their businesses and grow tremendously, so I’m extremely proud of that,” says Jose.

AutoEntry offers a simple, user-friendly interface for any company drowning in manual data entry. “Without AutoEntry, we would probably still be doing catch-up work for a lot of our clients. We would not be able or have the capacity to serve the number of clients we do. We would have been greatly hindered, 100%, by the fact that we do not have the manpower, and our labor costs would have been a lot higher, because I would have had to bring on more people to take the place of these applications that I have,” says Jose.



#### **About AutoEntry**

AutoEntry is the data capture app for accounting professionals that quickly rebuilds and maintains your client's books.