**Customer case study – Accurise**

Accurise is an outsourcing accounting organisation specialising in management accounts, bookkeeping, businesses information and support.

Accurise went live with Xledger in February this year, so we caught up with the CEO, Rob Howard, to get to grips with how they are using Xledger to service their clients.

**THE CHALLENGE**

Rob was working at a previous accountancy practice before setting up the newly formed Accurise. The former company was using manual processes to serve its clients, a means that was ultimately proving ineffective as customers felt disconnected from the numbers and felt they lacked insight and control. Rob identified the need for larger outsourcing software and decided to embark on a new venture with Accurise.

Rob observed that “as an accountancy practice, we realised that where the real value is in the market is the more complex customers that want something more than just having their statutory obligations met, such as VAT returns. There are lots of companies out there that are scaling up and wanting to bring insight and control, but still want to outsource their finance department.”

He emphasised that “we wanted to utilise a modern finance system so that we could provide our customers with the benefits of outsourcing services while allowing them to maintain visibility and control. We saw how we could leverage the technology to provide our clients with a one-stop solution for expenses, document management approvals, consolidation, and live reporting.”

Ultimately, Accurise wanted a solution that could provide superior customer experience, from the onboarding experience to the insight they could offer over their clients’ financials.

**THE SOLUTION**

* Real time reporting functions with the ability for customers to interrogate transactions
* Complete visibility of costs with full audit trail over approvals
* An all-in-one solution for clients covering expenses, approvals, consolidation, and live reporting; all accessible from one place
* Payment integration for clients to approve payments directly from the finance system, removing the back and forth manual correspondence
* Scalable solution that onboards clients efficiently, facilitating both improved customer experience and business growth

**WHY WAS XLEDGER THE RIGHT FIT?**Rob Howard, CEO, Accurise

“We looked at a range of accounting solutions and realised that other systems just couldn’t achieve everything we wanted. Most accountancy practices are on Xero, but even with add-ons, it was a fragmented solution that wouldn’t suit the needs of organisations as they grow.

Xledger instantly provided a high level of customer service and even took to putting us in touch with other partners who spoke very highly of the system. We were impressed with how well established the product was in Norway where it has a large market share, and by the relative size of companies using outsourcing clients compared to the UK market.

In the UK, clients normally insource when they reach a certain size to maintain visibility and control. This opened my eyes to the power of collaborative cloud technology. If you allow your end customers to maintain visibility and control over their finances, there really is no value with insourcing.

While some of Xledger’s partners include big, well-known accountancy practices like PwC, it was exciting to see other partners such as ViewLedger who had grown with the Xledger software into recognised brands.”

**IMPLEMENTATION AND TRAINING**

Accurise undertook a two-month training programme to understand the ins and outs of configuring the software so that their customers need not undergo the training themselves. As Rob emphasised, “because we’ve undergone the training, any customer wanting to onboard with us gets the configuration in just a few tweaks. This is how Xledger enables us to offer premium software at a discounted rate.”

Since going live with Xledger in February, Accurise is “still learning about the system and continuing to receive support from the Xledger consultants” Rob said. He noted how “Xledger made us feel especially welcome and supported during the implementation process” and that the "free demo environments Xledger provide are particularly helpful for learning to configure the system."

**POST IMPLEMENTATION RESULTS**

At the outset, Accurise was keen to remove the burden of manual tasks from the client, that being the constant emails and follow-ups; something that Rob said Xledger’s integrated document management system “facilitates brilliantly, while also reducing the chances of manual error.” He went on to say that “our customers have enhanced visibility and control with access to in-system live-reports through budget holder dashboards, and budget holders can likewise gain confidence and understanding over their financials by drilling-down to the individual transactions.”

Regarding the customer experience that Accurise was eager to improve, Rob said that “we now have a system that works infinitely better for our clients.” He added that “Xledger is truly is a one-stop solution covering expenses, approvals, payments and reporting, and all our customers can log in to one place. We can offer them enhanced visibility and control, onboard them quickly, and as it’s a larger more scalable solution, customers can use Xledger as much or as little as they want during the growth period.”

**THE IMPACT OF COVID-19**

Talking about coronavirus crisis, Rob said “when I founded Accurise it was important to me that I could give my team a great work-life balance, so the ability to work seamlessly remotely was one of the reasons I chose Xledger as our software solution. Little did we know that COVID-19 was around the corner so choosing Xledger has turned out to be one of the best decisions we made.”

He went on to tell us that “in terms of our day to day operations, not a single thing has been affected and we have carried on working exactly the same as we did previously. That is now a great discussion point when we are talking about our services with potential new clients, as we offer an uninterrupted service, even during the worst pandemic in a generation.”

**HOW HAS XLEDGER IMPROVED YOUR BUSINESS?**Rob Howard, CEO, Accurise

Fundamentally, Xledger’s technology is giving us a competitive advantage by allowing us to enter a unique market. We can offer customers access to premium rate software who otherwise wouldn’t be able to afford it themselves.

With Xledger, we can cater to a larger, more complex client base and provide a better service at the same time. The software is undoubtedly a true asset to business process outsourcers.”