

## Success Story

# Atlanta-based Check and Balance Firm utilizes Sage to streamline processes

Accounting practice increases efficiencies across the board



Check and Balance Firm is a bookkeeping and tax preparation firm which, for the past 16 years, has been serving a wide range of clients from dentists and event planners to truck drivers and funeral homes. Founder Tiffany Wilson continued the family business of accounting, learning the ropes from her father.

Sage Accounting has been helping the company transition during the pandemic and grow its business clientele.

### Key outcomes

- Reduced man-hours
- Saved thousands of dollars per year
- Optimized efficiency with a cloud-based platform
- Increased sales 20% per year



### Company

Check and Balance Firm

### Location

Georgia, US

### Industry

Accountants and Bookkeeping

### Sage Products

Sage Accounting



### About Check and Balance Firm

Check and Balance Firm is a bookkeeping and tax preparation firm which, for the past 16 years, has been serving a wide range of clients from dentists and event planners to truck drivers and funeral homes.



### **Prepared for anything**

Check and Balance Firm had been using Sage Accounting leading up to the sudden changes and difficulties brought by the global pandemic, but those challenges other companies were having to face had already been addressed by the Sage platform.

“It’s so crazy because I felt like I was preparing myself for the pandemic years ago. I had all of this stuff in place. So, it was like when the pandemic came, it was just like, ‘Oh, you’re okay, because you already have your systems in place.’”

### **Sage offers peace of mind**

The user-friendly features stop businesses from worrying about what’s going on with the software, and they can instead focus more on what their clients need and what they can do to grow and succeed.

“In this industry, it’s already frustrating dealing with the different agencies, like the IRS and the different state agencies. We don’t need that kind of frustration with our software. I feel like Sage does everything that I need it to do.”

### **Greater functionality, better efficiency**

With the automated features in Sage, businesses can speed up their productivity. “Before, I probably was spending weeks just on one client and now it’s cut it down to about three or four clients in a week,” says Tiffany. “As soon as I put the information in Sage, I said, ‘This is how your stuff is supposed to look.’”

Having more time enables companies like Check and Balance Firm to take on more and expand as they were never able to before. Tiffany says her firm used to do taxes only and has since added tax planning, bookkeeping, financial planning, and even business consulting.

### **Work on the go... literally**

Sage has quick and easy functionality that can be utilized anywhere, any time. As a company dealing with clients all over the country, Check and Balance Firm is always able to accommodate and help... even with those clients who never sit still.

“They [truck drivers] didn’t shut down for the pandemic. They’re on the road and we’re asking for things like ‘Hey, I need this receipt, I need that invoice,’ and they say, ‘Oh that’s all right. We got all that stuff.’ They can just take pictures and send it to us.”

The impacts Sage has had on the Check and Balance Firm are many and varied, but they all lead to the same thing—a bigger business, a more successful company, and happier clients. By implementing automation and cloud-storage, Tiffany’s company is seeing more growth, with fewer complications.

“I feel like in the future this is definitely going to allow us to work with more clients in a more efficient manner. We can do a lot more time management by using this product.”



Sage

**DSD**  
BUSINESS SYSTEMS

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