

CASE STUDY - Not so tech savvy

Client: Small private apartment turnover company

Client Location: Virginia

Problem: The Company promoted a staff member to manage the books and work directly in their accounting software. This staff had no prior accounting or accounting software knowledge or training. Management was seeking training on how to navigate the software so that the staff could produce the reports they needed on a monthly basis.

Goal:

1. Maintain and manage accurate accounting records for the company.
2. Submit timely monthly reports to management.
3. Plan to maintain records on an ongoing basis.

Solutions: We trained the staff on how to navigate their accounting software.

- Developed customized step by step operating procedures on how to input individual transactions and manage the books moving forward.
- A Financial Flow System™ was created to develop a better workflow process.

Results: After implementing our recommended solutions, management was able to:

- Gain financial insight around how to take their business to the next income level.
- Focus on their individual business markets and analyze their viability effectively.
- Input and manage their profit plan within the system and track how they were trending towards their goals.

Testimonial:

“Before Sherrell trained me on how to use QuickBooks, I was hesitant to use the system. I had just recently took on the responsibility of handling the day to day bookkeeping and had never used it before. Sherrell trained me one-on-one so that I could learn how to navigate through the program. As a result of her training, I have experienced a great improvement in being able to keep track of the company’s finances and records. My advice to those who are looking to take a training session with Sherrell is that it will be one of the wisest choices you will make regarding the accounting and finances for your company.”