

Out with the old and in with the new

Overview



Kate Zablocki started her bookkeeping business 12 years ago with her mum. She has been an MYOB Partner from day one, later becoming an MYOB Certified Consultant. Her client base is diverse, ranging from small clients with no GST requirements right up to large clients that turn over \$13 million. “99% of my growth has come through word of mouth,” points out Kate. “A lot of my work comes through accountants who recommend me to their clients.”

Working together in the cloud

“I am a big technology fan,” says Kate. “In the past, Mum and I started putting our files in Dropbox, but the challenge was that we could never be in the same file at the same time. When AccountRight Live was introduced we jumped on board. We started using it for our business and the fact that we could be in the same file at the same time was brilliant.” Once Kate knew it worked for her, she started moving her clients online.

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Keeping things simple

Kate discovered that working in the cloud made life a whole lot simpler. “The bank feeds are a huge benefit to me. It creates so much more accuracy with the data. I think MYOB has the best bank feeds of all accounting software providers. Personally, I’ve never had a problem with the accuracy of any of the MYOB feeds. It has made life a whole lot easier,” explains Kate. “A small job that used to take me 4 hours I can now do in half an hour. The bank feeds make doing work a lot more efficient. I also have the flexibility to work where and when I like.”

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Overcoming the challenges

“It was a little more challenging to upgrade clients who were previously not paying (a subscription) or using an older version,” says Kate. “Because I get the 20 free files through my partnership with MYOB the process for moving some clients online was a little slower. It took a little more convincing. For those who showed resistance, I explained how bank feeds can save them a huge amount of time, and potentially reduce my bookkeeping fees a little as I’m spending less time working on their files. I’ve moved most online now though,” Kate continues, “trust is important. Most of my clients have been with me for a long time and trust what I am telling them and know that I’m looking out for their best interest.”

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Smooth sailing

“Physically migrating the files from desktop to online was very simple,” Kate says happily. “I could convert and upload a file within an hour or two for most clients. There were a couple of instances where I needed help from my partner manager Julian and he did this very easily. My biggest client had 3 files. The update was slow and happened overnight, but it was all pretty painless.”

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Goodbye to the old way of working

Thanks to the cloud, Kate has been able to take on more clients. “It’s because I can work remotely and get more done in a day,” she explains. “The workflow is a lot more efficient compared with 5 years ago. I also have more flexibility to work the hours I want and be there for my kids.” Kate concludes, “To be honest, I don’t how we used to do it in the past.”

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