

# Growing, growing, grown!



## Overview

Moving her clients online helped **Margaret Whitfield** transition from bookkeeping into the advisory space. The cloud has opened up many opportunities for Margaret, allowing her to further develop her skills and grow the business. "I now call myself a 'Business Improvement Specialist' and I'm able to offer my clients valuable business advice."

## Testing the cloud

Margaret was a beta tester of cloud technology and saw all the benefits it had to offer immediately. "I love bright shiny new things," says Margaret. "Cloud has been one of the main reasons we've been able to grow as we have. The automation and add-ons mean we can spend more time with a client and be more consultative. 95% of our clients are now on cloud products."

**"Cloud has been one of the main reasons we've been able to grow."**

## Moving clients to the cloud

When it comes to moving clients to the cloud, Margaret says, "Our approach is gentle and we form good relationships. A lot of clients are embarrassed at first and think they are computer illiterate. We're happy to jump on the computer and have online meetings with them, share screens and show them how it's done. It's also important to know and understand what they are capable of and make adjustments according to their capabilities."

## Boosting efficiency is a snap

Working in the cloud has helped boost efficiency for Margaret. "The cloud has definitely increased our level of efficiency. It's allowed us to help more people and therefore grow," says Margaret. "The fact that we don't have to be face-to-face anymore means we are able to turn things around faster for our clients and stay on top of it all, especially at end of financial year. In the old days, we drove from site to site and saw 3 clients a day. Today we can work with 5 to 6 clients with no trouble at all."

Being cloud-based has also helped Margaret diversify and become the recommended trainer and bookkeeper for Snap On Tools franchises – a global leader in high end, professional tools and equipment.

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Want to learn more about the benefits of moving your clients online?  
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## Sound advice

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Margaret has also started using MYOB Advisor, a tool powered by AI and natural language capability that makes giving client's advice easier than ever. "This has helped some of our clients better understand their financials and allowed us to start some conversations about how we can help them more with the business side of things," explains Margaret. "Our clients are getting more relevant and up-to-date data. They are reaping the advantages of this. In the past, we could only give them quarterly data for say January to March in mid-May – which made it virtually useless. Now we have the information at our fingertips and we can be there to help them make better business decisions. In turn, this has meant our role has changed, particularly for me. I'm operating more in the advisory space and can now offer more value-add services."

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