



SWITCH CASE STUDY

Billie McLoughlin



Billie McLoughlin has been the Business Development Manager at Sowerby accountants for just under a year now, and qualified six years ago. Her passion is implementing anything that could help clients with efficiencies and profit - which has meant specialising in cloud accounting technology.

Dext



Sowerby's starting point

Sowerby is mainly a Sage practice - 90% of our clients that use software were or still are on Sage desktop. Billie says it became apparent during the pandemic that this was inefficient, because bookkeepers were having to go get backups from clients to then install on their machines, and with them not being in the office, it was more time consuming for the IT manager if there were any issues. Due to the software not being as streamlined as possible, it was taking Sowerby's internal bookkeepers a lot longer to do their bookkeeping than it would have if they were using some more advanced features available in specialised cloud accounting products/features.

The first steps toward optimising



Billie McLoughlin

Business Development Manager
Sowerby

Prior to joining Sowerby, Billie's software of choice was QuickBooks. "But I guess I didn't want to come in like a bull in a china shop and say, we need to change this, this and this. So we're trying to pick the easy wins. And I felt like it was a progressive sort of process," says Billie.

For example, a bank feed on accounting software is very appealing - that's what a lot of people like to use the software for - and Sage desktop actually has that feature. Part of what Billie needed to do was show people that she wasn't forcing any major changes, she was just helping them to get the best out of the software they were already using.

"I guess I'm kind of just scattering the breadcrumbs at first that sort of lead them down the path that I think will be beneficial in the future. And that way, I think we're gonna get a lot less resistance. Nobody wants to be the new person that comes in and people say, 'Who does she think she is? She doesn't understand the way we do things here'."

Along the way, Billie was able to get an understanding of why her colleagues used the systems and explain how digital accounting software can enhance them, she felt it was important the learning was a two way street.



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Introducing Dext

Billie had previously used Receipt Bank - now Dext Prepare - before joining Sowerby, which happened to be in November, during a very busy tax time.

“A lot of the accounts team were doing the account jobs that would then go through taxes and tax returns. And I would go through when they were typing up bank statements. And as I said, you know, you don’t want to go in there like, ‘What are you doing?’ - but as I was thinking, you have some of the senior qualified members of staff, literally typing a bank statement. So I suggested that we use software to scan bank statements.”

Initially, Billie introduced Sowerby to Auto Entry, because it’s owned by Sage - she believed there would be a better integration. However, after about four weeks of implementing it, and going through a convincing stage with the bookkeepers and teaching the internal accounts team to use it, she realised that it probably wasn’t going to be as progressive as Dext, and it would be much more difficult to switch software in two years’ time.

Billie recognised it was risky, but she decided to go all in on Dext based on her belief in the product roadmap. And, in fact, she found that Dext integrates with Sage better than Auto Entry - despite her initial assumption. She also found that the all-important bank statement feature is easy to use, so the team is getting those quick wins and giving people a positive association with the software early on.



“I suggested that we use software to scan bank statements”



Winning hearts and minds for a second switch

Billie says she had to swallow her pride when she asked the team to switch to a new software after just a few weeks. “I had to say, ‘I apologise, I’ve made a mistake’. I couldn’t beat around the bush and give excuses.”

She called each member of the team personally and thanked them for adapting quickly to Auto Entry, and then explained why she believed they should use Dext going forward. She also apologised and said hopefully in the future they would be able to see why she believed this was the right decision: for her, there are a lot of features that Dext has that Auto Entry doesn’t, which the team wouldn’t know yet.



“I asked the team to switch to a Dext after just a few weeks”

How the change has been received

Since the pandemic, Sowerby’s bookkeepers are all remote. Now, with the help of Dext Prepare, the admin team is scanning the invoices and the bookkeepers are just doing the more technical work.

“It’s hard to get people out of habit, you know, we do still have bookkeepers that like to then put the invoice in alphabetical order, even though they’ve all been scanned in the software. But I think you have to allow them to take things like that on board until they feel comfortable enough to let go.”

Billie says many of Sowerby’s bookkeepers have taken to the change very well - being able to just click a link within the software to see the invoice itself, rather than going to the files, has been a big change. And the clients have seen an absolute phenomenal time saving, too.

The process of switching

“Switching to Dext was seamless, there were no issues whatsoever,” says Billie. “It was just a case of we had to draw a line in the sand and say, right, from this point onward, we will be using Dext and Dext only. And that was great.”

Billie got the team to make a list of the jobs that they did, from year end to how many invoices they have, and whether they were using Dext. Then, for the ones they hadn't used the software, she asked them to do it the next time the task came around.

“I think it's just knowing the cutoff point for each client, because if they are going to look for an invoice in the future, they need to know whether they're looking for a manual invoice, or whether it's the format they could find on Dext. So I think as long as you've got a date in mind, the actual transitions, that's straightforward.”



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Support from the Dext team

The eight-stage training process was really beneficial to the Sowerby team, making them feel confident and included. They also asked for just a question and answer session to go through different parts of the product once they'd started using it more, which they found very useful, says Billie.

The Sowerby team also requested a feature not yet available on Dext, and the support team granted immediate access to the beta version. There's also a way to suggest new features, which has made the Sowerby staff feel like it's really working for them.

What's the verdict: was switching a success?

“Yeah, 100% - it's not just internally and externally. It's been brilliant,” says Billie. “We had one client, the first one, we implemented it at their premises. They save on average 1.8 minutes per invoice. And when you work out the savings of that, we now use it as a case study to tell other clients how beneficial this will be. You just can't fight against the numbers.”

Billie thinks people underestimate how much

admin time Dext Prepare can save. At the client she references, they have to send a single invoice to three different departments, write a job number on it, and they would have to then file it at the end. Now all three departments have access to that in Dext and only one person scans it in, or it's even easier because it can just go straight from an email or into Dext. That is why she says Dext has been a huge success with accountants and bookkeepers.

The value of switching quantified

Billie has seen instances where the MD is having to do the bookkeeping, with so many industries being short staffed at the moment, but DEXT has allowed them to shift their concentration back on the business rather than working day-to-day in it.

There is a client who has just been converted which Billie believes is looking to save up to 15-20 hours a week, equating to 1000 hours a year for that business.



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Why implement a cloud accounting software if you don't have one?

"I just don't understand why anybody would not use a software like this," says Billie. "Whether you use any software, whether it's a desktop, or a cloud version, if you're using cloud versions even better. But I don't understand why anybody would not use a system like this, based on the fact that it allows people to get more job satisfaction."

Billie notes that it's extremely important that people are able to enjoy their work - and that it's unlikely that people are enjoying re-typing invoices and bank statements. But if you could allow AI to do 50% of this work, you can let the

team start to actually humanise the numbers and know what those numbers mean. Trainees also learn nothing from retyping bank statements, so software allows them to learn more.

"Ultimately, the question is, 'What else could people be doing with that time?'"

You have to value time, I think that is that is the key takeaway. But yeah, Dext is a fantastic product. And I don't know why anybody wouldn't use it."

Why SWITCH to Dext from a competitor?

If you already have software in place, Billie says the reason to consider a switch comes down to functionality. "A lot of software now have receipt capture within them, but as far as I'm aware, other software doesn't have the invoice fetch function which Dext has. This means you can actually look at your bookkeeping software, have done nothing and information be in there, because it's literally auto published the invoice into the software. So I think things like that, as much as a lot of the older generation may find that frightening, the younger generation will find it much more convenient. It is the future."