



**Dext** |  **Precision**

**How Cloud 9 Strategic  
Boosted Productivity by  
20% with Dext Precision**

## About Cloud 9 Strategic



**Jeannie Savage**

From the get-go, Cloud 9 Strategic Bookkeeping Services are clear about their work's value and what really matters to their clients. The clue is in the name, and strategy sits at the heart of how they differentiate themselves in a highly competitive and price-sensitive sector. The firm's clients are located across Australia, and they are drawn from different sectors especially that of tradies and cafes.

Jeannie Savage, CEO of Cloud 9 Strategic, established the business more than a decade ago and has steered its evolution into the present-day structure. Her strategic mindset is apparent in her decision to base her tech stack in the cloud, which future-proofs the practice and makes it easier for her team.

Over the years, Cloud 9 Strategic has built their expertise in cloud technologies, starting with the accounting software cloud pioneer Xero. Now, Jeannie's teams and clients work smoothly together from wherever they happen to be based, keeping on top of the flow of information with the smart application of workflows. The result is a bookkeeping service that uses technology to streamline its processes to deliver cost-effective services and make life easier for its clients.

As part of the continuing efficiency focus, Jeannie can now also count on Account Manager Jo McMahon to research and test technology that can fit Cloud 9 Strategic's existing stack and be rapidly deployed to make an impact for clients.

# The Opportunity

Cloud 9 Strategic has been using Dext Prepare for a while and it's a firm favourite between the team. Clients snap a photo of a receipt and send it directly to Prepare for automated processing, then they get back to business. The cloud-based solution integrates seamlessly with both Xero and Quickbooks, working away in the background to extract every line of data from the paperwork and applying rules to ensure tax and account allocations are accurate.



**Dext Prepare is a part of the everyday technology that helps us remove the effort in the capture, analysis and recording of paperwork, such as receipts and invoices.**

**Jeannie Savage**



In 2021, Jeannie discovered Dext Precision and quickly realised it could be a step-change to support Cloud 9 Strategic teams to work at a more advisory level with their clients. Precision combines seamless connectivity with Xero, workflows and artificial intelligence to produce a dashboard that shows a helicopter view across all clients and then drills right down into the client's data on the accounting software.

"We already had good systems in place. However, using these to quickly see all the clients' work as well as check if tasks were being completed in the set timeframe and according to our standards was so onerous... I was losing sleep", remembers Jeannie.

Thankfully, she realised that Dext Precision could rapidly return its value by helping the bookkeeping teams spot anomalies and problems as they arose and bringing workflow functionality.

# The Solution

One might think that a project like this would take a long time before it starts to make a real contribution - but it took just two month-ends for Dext Precision to start making a massive difference.

1. In the first few weeks, the team worked to document their month-end procedures and set up corresponding workflows in Precision. It was time well spent, with the staff familiarising themselves with new processes and resolving errors and duplications in their client's data.
2. By the end of the second month, they had tweaked their processes to further streamline the tasks. The result was an entirely automated set of month-end procedures.
3. With Dext Precision in place, the month-end process is fully automated with any queries highlighted. Answers can be found by digging down into Xero directly from the dashboard. Any questions or actions arising are communicated directly to the relevant team member or the client.



**The workflows we built into Precision allowed us to better manage everything. This meant reduced keystrokes, much faster and more efficient task and staff management, time saved and increased capacity. Honestly, it was the same as employing a manager.**

**Jeannie Savage**





# The Impact

The implementation of Dext Precision has been a major evolution for Cloud 9 Strategic, with improved internal processes and data accuracy. The app's management dashboards provide health scores for critical measures, so the team is always instantly informed of any issues as they arise.

The overall result has been an approximately 20% increase in team workload capacity. It's also much easier to identify potential problem areas of individuals and groups of clients, so they can act swiftly. Cloud 9 Strategic's teams are freed up to do more valuable work for their clients.



**I got so much peace of mind and better sleep knowing we were more sorted, without unexpected nasty surprises. The effect Precision had on our practice and on my life has been like no other software we've ever used.**

**Jeannie Savage**



Jeannie also highlights the challenges of managing staff and workloads, which are now made much easier with the automation.

"For me, Dext Precision is a machine-manager. Managing staff will always be one of the greatest challenges any business faces and in Accounting and Bookkeeping, our staff performance is so central to our business success", she says.

Cloud 9 Strategic's experience with Dext Precision shows that sophisticated accounting and bookkeeping technology is within reach of any strategically-minded business. Dext are proud to play a valuable part in this journey.

**Dext**

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