

Dext

Case Study

Business Sherpa Group

How Business Sherpa Group scaled their bookkeeping practice by 200% year over year

**Empowering small
business advisory**
through greater insights



With COVID, nobody can go into the office anymore, and their accounting essentially stops -that's terrible for small business. You need cloud accounting to solve this."



Brandon Brown
Financial Controller
Business Sherpa Group Inc.



About

[Business Sherpa Group](#) exists to help small and medium businesses conquer their financial challenges and develop the insights they need to grow. Business Sherpa Group offers a whole stack of services to lessen the challenges that small and medium businesses face when handling their operations—operating in spaces like HR, Recruitment, and Bookkeeping.

Brandon Brown and his team at Business Sherpa Group work tirelessly to develop and deploy the best tools for their diverse pool of clients. Focused on Bookkeeping, Brandon and his team are searching for tools that can unlock deeper insights and power new levels of advisory. With his keen focus on optimizing the tools at his disposal, Brandon found Dext and began to deploy it as the solution they needed to elevate the services possible within their bookkeeping practice.



Opportunity

As an early adopter of accounting tech, Brandon understood the unique advantage of an agile and advanced tech stack. Brandon understood that pushing technology would allow them to create more efficiencies and internal optimizations, driving productivity and new revenue opportunities. To help create a comprehensive tech stack for their bookkeeping clients, Brandon and the team and Business Sherpa Group turned to Dext to deliver the services they needed. They sought a tool that would allow for quick and seamless communication, remote capabilities, and a way for them to go beyond the routine in-person traditional bookkeeping.

Brandon and his team realized that the clients they were servicing could benefit significantly from cloud accounting. But converting their clients from traditional bookkeeping methods to cloud-based wasn't always easy - change is intimidating, especially when it comes to finances. But as COVID stormed onto the scene, it became more of a need than a want.



Solution

Business Sherpa Group saw extensive growth throughout the last year, especially within their bookkeeping practice. Brandon noted that COVID and the new remote environment had been a prominent player in that growth. He recognized that, "With COVID, nobody can go into the office anymore, and their accounting essentially stops -that's terrible for small business. You need cloud accounting to solve this." By rolling out Dext for their accounting practice, Business Sherpa Group met their clients where they were and enabled cloud accounting to drive new results.

For Brandon and his team, Dext provided the comprehensive solution that included the needed flexibility to work with the array of accounting software that his clients would use. Although Business Sherpa Group had a recommended internal tech stack, many of their clients were employing an



As we recover from this pandemic, it will be imperative that we, as accounting professionals, have the tools we need to advise our clients and strategize a plan for moving forward.”



assortment of tech making it challenging to develop a blanket solution to meet all their needs. However, with Dext’s multitude of integrations at hand, The Business Sherpa Group team could create a centralized tool to meet their client needs. In addition to the integrations, the Business Sherpa Group team also found immense value in the core functionality available in Dext Prepare - especially the ability to control users. Having specific user roles and audit logs removed the mystery of who and when something happened and allowed easy questions to be answered immediately.

Result

For Business Sherpa Group, the immediate result of using Dext is happier clients and reduced time commitments. Brandon shared, “Someone is usually doing data entry as a full-time job, five days a week. But with a system like Dext, you suddenly go down to two days a week. That alone is big dollar savings just by putting the system in place.” With the time savings, his team is now able to power their advisory even more. The question has transitioned from how we get the data to how to best use this information to empower our clients.

Dext has allowed for Business Sherpa Group to rapidly increase their onboarding because of how easy to use the system is. Their onboarding includes a run-through of Dext that allows for both their clients and staff to clearly see how they will operate with the digitized processes and get to a more efficient future state.



Impact

As Business Sherpa Group continues to expand, its focus is on how to scale efficiently and sustainably. One of the crucial things that Dext allows is for them to recruit a wide array of accounting and bookkeeping professionals without specialization. With tools like Dext in hand, they have a baseline for what they need and can fill in the necessary gaps with the ever-evolving technology available to the market.

Brandon and The Team at Business Sherpa Group are committed to leading the wave of “new accounting” by continuing to harness and discover the best technology available to them to drive more and more value for their clients.

**Ready to
redefine
business
advisory?**

Book a consultation
with a member of
our team.

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