

How Accelo Helped Save This Accounting Firm 200+ Hours Per Year

Case Study Key Highlights



Vector Business Solutions is a US-Based QuickBooks® Consulting and Outsourced Accounting firm that serves small to medium-sized businesses nationwide. They offer a wide variety of services, including ongoing bookkeeping services, process documentation, integration assistance, and more.

Vector Business Solutions' Challenge

The biggest pain point for Vector Business Solutions was the inability to see the full workload of each employee. Resource management became the biggest priority for the team.

Benefits of Choosing Accelo

Reduced Overhead Costs

There has been a decrease in costs as employees moved away from non-billable activities.

Improved Quality of Work

Clear visibility into team workloads means management can better distribute projects without overworking employees.

Time Saved

Accelo saves the company over 200 hours per year of administrative work, giving them more time to focus on billable work.

Better Promptness and Consistency

Proposals plans are built and sent to a client within one hour of a consultation allows them to get ahead of their competition.

“The key things are better control and a better understanding of the work and commitments we have,” Susie said. “Accelo makes sure that we are actually performing all the services we are contracted to do while staying on schedule.”

- Susie Schade, CEO and Founder

Before Accelo

Vector Business Solutions is a QuickBooks® Consulting and Outsourced Accounting firm located in San Diego, California. The team serves small to medium-sized companies nationwide, and their services include ongoing accounting and bookkeeping assistance to help companies establish more streamlined and organized financial processes to better set themselves up for success. Susie Schade, CEO and Founder of the firm, started the company 12 years ago after recognizing that small to midsize businesses did not have the support needed when dealing with QuickBooks® implementations and ongoing finances. Since its founding, the firm has continued to grow and support clients all over the United States. The growing team also operates 100% remotely, which requires a high level of communication and organization to ensure client and internal operations run smoothly.

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The Challenge:

Prior to using Accelo, Susie had gone through multiple different platforms looking for the right one to help support her growing team and business. The most recent tool, called Amicus Premium, is a case management solution made specifically for the legal profession. Susie's team used it to manage clients, cases, and jobs to stay organized. Eventually, the team realized they needed more features that were not supported on the platform or were not available in their particular package.

"It was not as full-functioning as Accelo," Susie recalls. "We needed resource management, a client portfolio, and a better sense of our workload. At the time we couldn't see how 'full' our plates were so it was difficult to determine whether the team was being over or underutilized. I was always worried that somewhere along the way we were going to miss a commitment with too many clients, too many different schedules, and too many team members. I needed peace of mind as we continued to grow."

Since Amicus Premium wasn't meeting all of the company's needs, the firm's leaders were spending **8 hours a week** on unnecessary manual work. This time was spent just trying to figure out who was working on what task, who was available to take on more work, and who was overbooked. Resource management became a high priority as more time was spent on these administrative tasks.

"Each of our clients has a unique schedule for all of our different service offerings," Susie said. "We needed a platform that would help us manage that better."

The Solution:

Susie knew what her team needed to be successful, so she began a thorough and extensive search that could help solve their pain points. She began researching PSA, CRM, Time Tracking, and Project Management tools. Overall, the team had a list of over 40 potential tools they began screening. After discovering Accelo in her explorations, she became intrigued by how inclusive the product is.

"Accelo is one of the very few services that could help manage both the projects and repeated work," Susie said. "Our team members work on both sides of the business, so we needed one platform for task management and time tracking for all of the work we do."

Once the firm decided to move forward, the next step was the implementation process. In previous experience, Susie knew that this could be a cumbersome and disruptive process, but was confident in the company's decision to completely implement Accelo within 45 days.

"We replaced our Amicus system all at once," Susie recalls. "I felt really good about it. Accelo covers a broad set of features that are 100% tightly integrated. I can see what's going on with a client, their prospective work, and what's actually been done all in one place."

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The Results:

Vector Business Solutions has been with Accelo since 2019. Since then, the firm's leaders have gone from spending **8 hours per week on busywork to just 4 hours**. That's over **200 hours a year the team** gets back to focus on billable work. Accelo has also helped **reduce overhead by 10% overall**.

“The key things are better control and a better understanding of the work and commitments we have,” Susie said. “Accelo makes sure that we are actually performing all the services we are contracted to do while staying on schedule.”

Another major improvement has been Vector's invoicing process. Accelo helped Vector Business Solutions create detailed invoices to its clients, making it much more clear what work has been accomplished. Tracking activities and time accurately are imperative to creating an error-free invoice.

“We have seen a lot of improvement in quality and timeliness of services,” Susie said. “We built some great templates in Accelo and have standardized how we present ongoing services and projects to our clients. It comes off as consistent and professional. We're also quicker. So when a client needs help, we talk to them, set up a consultation, and build out a project plan. The plan can be sent to them within an hour. Our clients appreciate the promptness.”

These are just a few features that have changed the way the Vector Business Solutions team conducts business. They heavily rely on retainers, quoting, projects, time tracking, and time reporting. Susie noted that her team leverages all the features and modules Accelo has to offer. As a leader, Susie no longer has to worry that a client might slip through the cracks with Accelo's all-in-one system.

“Accelo helps us make sure we are meeting our committed services to our clients, saves us time, and gives us visibility into resource utilization,” Susie said.