



Why Accounting Firms Are Increasing Productivity Using Accelo

Jorge Fernandez is the CFO of GBS Group, an accounting and tax firm that developed into a full-service business consulting agency. Founded in 2000 by his father, Jorge Fernandez, they specialize in facilitating Hispanic entrepreneurs who are just starting out in the U.S., and European and Latin American-based companies.

Key Challenges

GBS Group found themselves stuck in a cycle we frequently see, prior to finding Accelo. They worked on CS Professional Suite by Thomson Reuters, an accounting specific software. However, they had to supplement this tool with Excel spreadsheets to run their operations, which created unnecessary headaches, halted productivity, and ineffectively measured

billable and non-billable time. Simply put, CS Suite alone wasn't congruent with GBS Group's business model, and the executive team knew they were losing time and money. That's when they found Accelo's client work management platform.

Before Accelo, managing time-tracking systems had been a struggle for their executive team. Employees were not working within CS Professional Suite out of frustration. Each worker had to use multiple tools outside CS and to make matters worse, they did not integrate. What they needed was a full-service operations model, not a traditional accounting system.

Challenge:

GBS Group was stuck using spreadsheets to run their accounting practice, making it hard for them to measure their billable and non-billable time. They were frustrated in using disparate tools, which made it difficult to communicate with other

Solution:

GBS Group was instantly drawn to Accelo's email integration. After integrating emails, they were able to easily track progress on client accounts, making time tracking much easier.

Results:

Today, everyone on the GBS Group team are on the same page and can access all client information at any time. With less focus on admin work and more focus on the client, GBS Group has been able to significantly increase efficiency and profitability.



"Accelo makes sure we never miss a deadline. We've increased volume and visibility."

Jorge Fernandez
Chief Financial Officer
GBS Group

Approach

Needless to say, GBS Group desperately needed an operations overhaul. They tested Accelo and were instantly attracted to the email integration: a feature that could greatly improve how they communicated with their clients. Quickly thereafter, they began to migrate to Accelo, and the results have been better than they hoped for: the executive team and the employees love Accelo. It's easy to track progress on client accounts, which, from a management perspective, has allowed them to take time management and time tracking skills to the next level. It's a much better way to get everyone's time tracked adequately.

On the client side, they have a 360-degree view of where they are with any client in real time. As a tax and accounting firm, making deadlines is essential. At any given time, GBS Group has a high volume of work coming in or coming out as deliverables. The level of production can make it hard for managers to track processes and progress. Accelo ensures that nothing falls through the cracks and there are no more surprises in regards to client tax penalties.

The Results

GBS has seen a great increase in efficiency since migrating to a client work management platform. Accelo has successfully helped the company save time and decreased their amount of organizational and non-billable work.

Before using Accelo, employees had to go back and forth with one another to get a status reports on a client. Today, everyone is on the same page and can access all client information at any time. A manager can easily step in if they're needed and no one is ever without the information or details they need.

"There's a lot of high volume work coming in and out, and before Accelo it was impossible to keep track of everything. A missed deadline can mean a tax penalty for a client."



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