



VICTORIAN WEALTH MANAGEMENT BUSINESS

talks the talk on time and cost savings
with the help of Sage One



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Customer Tax Talk	Industry Financial Services	Location Maidstone, Victoria	System Sage One Sage HandiSoft
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Overview

Tax Talk is a Victorian based business that has been in operation for over 29 years. The team provides tax/ accounting, property and wealth investment services to a wide range of clients. Additionally, Tax Talk offers its small business clients professional guidance and tax compliance advice.

Tax Talk is a team of eight including five accountants who service approximately 1,300 clients focusing on small to medium businesses.

Challenges Faced

The team had previously been using Xero and MYOB in order to work seamlessly with numerous clients using the same solutions. Xero with its cloud capabilities was easy to learn, simple to use and streamlined everything for the

team. However when Sage One launched in May 2015 with similar cloud capabilities, Tax Talk was attracted to both the easy integration with the HandiSoft modules they were using and the lower price point.

“Recommending a \$15 a month solution to clients is much easier than \$50 a month charged by Xero especially when the functionality is comparable. Having hands-on experience with both solutions, the team has increased credibility when giving advice and recommendations that are best for the business as well as the clients.”





The Transition

For Tax Talk, the transition to Sage One was seamless. Thanks to the fantastic customer support from Sage during the implementation period, Tax Talk had no disruptions to their business during the transition. All processes and client work was business as usual and the integrity of all their documents was uncompromised.

"The customer service team have been fantastic. They were always ready and willing to arrange training sessions to onboard clients and ensure everyone understands the real benefits of Sage One. Benefits which lead to increased efficiency and productivity" continued Barba.

Tax Talk currently has eight team members fully trained on Sage One with the rest of the team completing their certification.

"As we continue to get the team fully trained and learn more about all of the time saving and valuable features of Sage One, we are looking forward to setting up our own training sessions and migrating more of our clients across to Sage One," continued Barba.

The Super Saver Solution

In addition to the upfront cost savings, the team have found a number of additional benefits from switching to Sage One. These include the simple integration with the Sage HandiSoft modules, improved efficiency and productivity in tasks such as producing profit and loss statements and the savings for clients from less billable hours.

Tax Talk also earns rebates of between 30 – 100% on net sales revenue from every client referred to Sage One. If enough customers adopt Sage One that are linked to Dominic at Tax Talk – the entire cost of their practice software next year will be paid for in rebates.

"When a client came to me with a compliance problem going back eight years, Sage One really had my back. After converting the bank feeds from PDS to CSVs I was able to import the data into Sage One which resulted in me being able to sift through eight years of data in one week and this was a significant time saver for our business," said Barba.

The team at Tax Talk look forward to transitioning more clients onto Sage One and exploring what Sage can offer other business units within the corporation.

About Sage

Sage Australia is a subsidiary of the Sage Group plc and has offices throughout Australia and New Zealand, and more than 25 years' experience in both local markets.

We provide small and medium sized organisations, and midmarket companies with a range of easy-to-use, secure and efficient business management software and services – from small business online accounting (Sage One), accounting practice management (Sage HandiSoft), payroll and HR (Sage MicrOpay), to business management and customer relationship management (Sage Business Solutions).

Sage energises the success of businesses and their communities around the world through the use of smart technology and the imagination of our people. Sage has reimaged business and brings energy, experience and technology to inspire our customers to fulfil their dreams.

We work with a thriving community of entrepreneurs, business owners, tradespeople, accountants, partners and developers who drive the global economy. Sage is a FTSE 100 company with 14,000 employees in 24 countries.

For more information, visit www.sageone.com.au

"I can fly to Europe or see 10 films in Gold Class at the cinema with what we save annually with Sage One and I'm very happy to promote the product as the functionality is so good."

Dominic Barba,
Managing Director, Tax Talk