

Case Study: Specialty Orchestra uses BudgetEase to generate needed reports to plan and forecast their cash balance

Interview with Managing Director

Background:

The group had an in-house Finance Manager. When their Finance Manager left, they had a hard time finding a cost effective solution to handle their QuickBooks. With an active performance schedule, the orchestra has a high volume of transactions daily. Additionally, they need sophisticated reports in order to plan properly for their upcoming events. Their bookkeeper has to be a problem solver and be familiar with bookkeeping best practices to keep the time it takes to do the bookkeeping to a minimum. In 2015, BudgetEase became their part-time bookkeeper and is currently in their office two days a

Q: Why did you decide to use BudgetEase?

A: We had a hard time finding a replacement. We had one candidate that seemed perfect but took another position. As a small not-for-profit, we work on a tight budget without a CFO. We need higher level bookkeeping. Using a typical in-house bookkeeper without above-average skills was a strain on the organization. BudgetEase was recommended. We were thrilled to find an affordable option that could provide the financial reporting we needed.

Q: What were your initial conversations with BudgetEase like?

A: Very straightforward. We outlined our needs and BudgetEase presented the services that they could provide. In previous positions, I had worked closely with my accountant. I was looking for a company that I could sit with to work on the financial information together and produce a budget. I was confident I could do that with BudgetEase.

Q: How long have you been working together?

A: 12 months.

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BudgetEase has positioned us to get financial information easier.

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Q: What has BudgetEase provided? (solutions/services)

A: BudgetEase was able to align QuickBooks with our other report that we use for financial planning and board meetings. Previously, producing these reports was a very time consuming process. Now there is a system in place and producing these reports is faster and easier.

“ The BudgetEase team is delightful, efficient, conscientious and understanding.

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Q: Do you see any differences in working with BudgetEase compared to an in-house bookkeeper?

Yes, BudgetEase was able to meet my expectations and provide the information that I need. The BudgetEase team is delightful, efficient, conscientious and understanding.

Q: What financial information is so important to you that you look at it every week? Why?

A: Cash Flow. We are in a much better position to create meaningful information than when there was an in-house bookkeeper.

Q: Results/impact of the relationship between BudgetEase and you.

A: BudgetEase has positioned us to get financial information easier.

Q: Any data to support the impact? (Time/money saved, etc.)

A: What we are charged is close to the salary level of our prior Finance Manager. We are getting very good service for the money that we are paying. We have seen what BudgetEase can do.

Q: If you could tell another like yourself of the value your partnership with BudgetEase provides, what would you say?

A: BudgetEase is a 12 out of 10.