



How our expert team helped S Smith & Co switch from Sage desktop to Xero



Natalie Lynskey
Manager, S Smith & Co



Meet the partner: S Smith & Co



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Founded over 20 years ago by Stephanie Dexter, Scunthorpe's S Smith & Co accountants has grown into a thriving mid-sized firm with a team of eight and 450 clients, ranging from sole traders and small start-ups to medium businesses and large companies. The firm prides itself on great customer service and communication.

“A lot of our clients use us because we’re very direct, easy to get along with and we use terminology they will understand and relate to,” says S Smith & Co’s manager Natalie Lynskey.

Making the move from Sage

For as long as Natalie can remember, S Smith & Co had used Sage desktop products. “We never really questioned why, we just did. We used Sage 50 Accounts, Payroll, Accounts Production - everything was desktop based.

In 2021, the firm reviewed its IT systems. “It made us think, why are we still using desktop models?” says Natalie. They realised that, to improve efficiency and futureproof the firm, it made sense to move to a cloud-based accounting system. “We’re a bit of an all-or-nothing practice, so we made the decision to switch everything to cloud.”

Making sure they picked the right product was key. “Our primary reason to move onto the cloud was that we knew that Making Tax Digital was ahead of us and we wanted to be fully confident with a product we could recommend to our clients.”

S Smith & Co did their full research, exploring all the different options available. “We did look at Sage cloud accounting but we didn’t have full confidence in the product and just knew it wasn’t going to work for us,” says Natalie. “After we spoke to Xero, we found them and the product impressive which gave us the confidence to go with them. When we had the calls to discuss it we could clearly see it had the full package to be able to follow everything through, so we wouldn’t need to link it to any other systems. That was the main selling point for us.”

“We came to the conclusion that Xero was the better option for us because we knew our clients would work well with it as well. Even just down to the interface and the Xero dashboard. It just is much more user friendly than the Sage cloud product.”



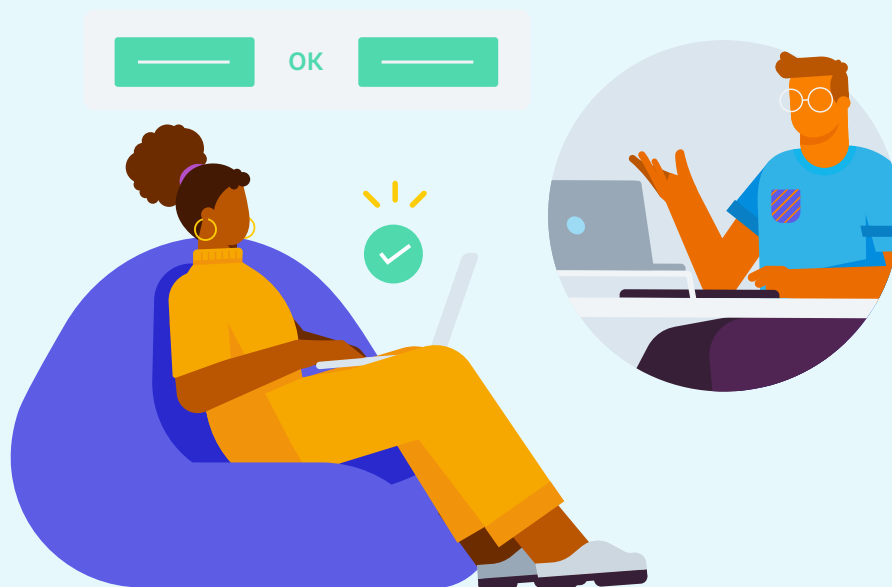
Migration made easy

In January 2022, the practice began the process of moving over to Xero. “We had a couple of meetings with our Xero account manager to help us decide what migration systems we needed, which was really useful,” says Natalie.

Xero has lots of tools and resources to make switching over easy, including a dedicated Migration Team, a free service that significantly reduces client set up time because Xero does the legwork for you. On top of this, there is plenty of support with your digital journey and migration from Xero’s Partner Consulting Team, who are qualified accountants with a background working in practice.

“It was really good to have our partner consultant Dan, because he’d worked in practice before,” says Natalie. “I think that made a significant impact because he could relate to what we were doing. Sage was just a technical support team. Whereas having Dan, we could say, right we’ve got this situation, how can we do that on Xero? I think it’s a massive selling point as to why to choose Xero as opposed to anyone else, because the support has been brilliant.”

The firm also used Movemybooks, a free third party tool that Xero has partnered with to offer transactional conversions from products including Sage 50, Sage Instant and Sage Accounting. “We used Movemybooks for the majority of our clients which was really useful. You can’t really go wrong with it. It’s so user friendly and someone was always there to support if there was a problem. So it was a very smooth transition. There was never any downtime and it never created any problems.”



Getting clients onboard with Xero

An important part of the migration was communicating the benefits of Xero to their clients. “For some clients we sent a package of videos of how Xero will work and what it can do for them,” says Natalie. “With some clients we know the problems that they have had with Sage, so we explain to them how they can overcome the problem in Xero and how it would be better for them. We help them to set it up and show how much easier it is for them.”

The practice has been in the process of moving clients over since January 2022. “As people’s books and records are coming in, we’re doing the transition,” says Natalie. “All of our VAT clients are now on Xero, and we are slowly bringing different digital elements to each individual client where we can, which we discuss in their end of year accounts meeting.” That has meant moving some clients to Xero on a partner edition subscription who were previously using paper records. The firm has also trained some of their clients to use Xero “They’re impressed with how easy it is to complete their sales invoices through the Xero app on the go,” says Natalie.

Even those who were reluctant to switch are glad they did. “We have a client that’s used Sage desktop for years and obviously that’s a challenge to persuade them why they should use Xero. But we reassured them it would be the best thing for them and we’d take them through the transition step by step. They’ve only been on it since August and they’ve already said how much quicker, more efficient and user friendly it is already.”





Reaping the benefits

Within just a few months Xero has made the practice more efficient, says Natalie. The firm now uses Xero Tax, an end-to-end package, for all their accounts production. “Just having everything in one place saves time, it’s easy to switch between tasks and Xero prompts you to do things so there’s minimal room for errors,” she says. “It’s much easier to delegate tasks and people can manage their own clients better.”

To help the practice make the most of Xero, Partner Consultant Dan Marshall and account Manager Kadie Walker visited the S Smith & Co offices to run a training workshop. “That really did help and it gave all the team an opportunity to ask questions and to really understand how to use the product,” says Natalie. “There were so many different avenues that we would have never known were an option without having the support of Dan. For example, Xero Workpapers.”

The team also prefers Xero’s report functions to Sage. “It seems to be much more interactive and user-friendly in Xero. We have the ability to customise the reports for each individual client, which is brilliant.”

Natalie's message to other accountants and bookkeepers thinking about making the switch is that, with careful planning and the right support, there's no need for it to be stressful.

“I would definitely advise another practice to go for it,” she says. “I think it sounds more daunting than it actually is.”



Xero makes switching from Sage easy.

**To find out more about migrating
clients over, and the options available
to you, visit our website**



Beautiful business