

# Case Study: Branding Agency Hires BudgetEase to Save Time

*Interview with Mark Nead, Partner/Co-Founder, Boondock Walker*

## About BOONDOCK WALKER

Boondock Walker works with companies in transition – from seasoned to startup – to create powerful experiences through distinctive brand foundations, messages and design.

### Background:

Boondock Walker had been handling their bookkeeping internally since they were founded in 2007. It was taking up valuable time that could have been used to develop new business and service current clients. In 2014, BudgetEase became their part-time bookkeeper and is currently in their office less than once a week.

#### Q: Why did you decide to use BudgetEase?

A: BudgetEase came highly recommended by Tammy Wise. She knew we were doing too much administration. Letting go of the bookkeeping function was very easy and appealing to us.

#### Q: What were your initial conversations with BudgetEase like?

A: We initially talked about system integration. We were using a number of applications like Zoho and wanted to clean that up. Mary (who is now our BudgetEase bookkeeper) had experience with Zoho. We chose BudgetEase to help us integrate our systems. BudgetEase's strong QuickBooks knowledge was a plus.

#### Q: How long have you been working together?

A: 18 months.

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

A: BudgetEase manages 3 different financial files. They keep all our banking information up to date on all our software. They remind us when payments are due and help to manage cash flow. They are a resource to us when we consider trying different financial software options.

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

A: Absolutely. The fact that Mary has so much experience gives me the confidence that our books are correct. Plus, we are now paying our accountant less because Mary is keeping our financial information up to date. Our accountant spends less time cleaning up.

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

A: Cash Flow, Accounts Payable and Receivables, what is outstanding, YTD compared to prior years.

**Q: What financial information do you wish you had that you currently don't receive?**

A: Cash Forecasting and a better sense of profitability per project to help us make better decisions on future projects.

**Q: What one activity do you feel is most responsible for the success of your organization?**

A: We have a great reputation for branding and creativity.

**Q: What are the results/impact of your relationship with BudgetEase?**

A: I am spending a great deal less time on the books. Mary also saves me time because I no longer need to interface with the accounting firm.

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

A: We are paying BudgetEase a bit more than half of what we paid our prior internal bookkeeper.

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

A: Mary is just exceptional in keeping us on track. We have a constant awareness of the books that we didn't have before. She truly cares.