



Case Study 1

A service company with 10 employees employed a full-time bookkeeper/office manager with full benefits. They also had QuickBooks Enterprise specialist that would come in and help them with quarterly payroll reporting and monthly accounting. They were also paying their CPA to look at their books quarterly, compile year-end financial statements and income tax preparation and planning. They also utilized an unorthodox version of terminal services for remote access to their server network which had it's own set of IT maintenance issues. After utilizing the Legacy Package they were able to realize significant upfront savings as well as eliminate their need for a server and network. Their full-time bookkeeper/office manager went to a part-time office manager which fit her family needs better and made her happier. She never really liked bookkeeping to begin with.

	Monthly	
	Before	After
Full-Time Bookkeeper/Office Manager	\$ 2,917	\$ -
Part-Time Office Manager	-	1,667
Taxes, Benefits and Workers Comp	591	453
Software	75	
IT Savings	175	
QuickBooks Specialist	400	
Year End Accounting & Income Tax Preparation	833	
Legacy Package	-	1,800
Total	4,991	3,920
Annualized Costs	\$ 59,890	\$ 47,040
Annual Savings	\$ 12,850	
Percentage Savings	21%	



Case Study 2

A construction company with 3 full-time office people was facing the retirement of a long time office manager. They were also looking at replacing their server and updating their aging computer network. Hosting Master Builder, Microsoft Office and CRM software in the cloud allowed them to outsource a portion of their bookkeeping and financial work. This created big savings. The server and network replacement was unnecessary and duties were rearranged so when the office manager retired there was no need to hire a replacement.

	Monthly	
	Before	After
Office Manager	\$ 4,583	\$ -
Office Team	6,250	6,250
Taxes, Benefits and Workers Comp	2,167	1,250
IT Support	400	-
Payroll Outsource	300	-
Year End Accounting & Income Tax Preparation	625	-
Legacy Package	-	2,500
Total	14,325	10,000
Annualized Costs	\$ 171,900	\$ 120,000
Annual Savings	\$ 51,900	
Percentage Savings	30%	



Case Study 3

A small construction company with two owners and a full time bookkeeper/office manager with no benefits already outsourced their payroll. They were getting year-end accounting along with corporate and personal tax returns done by their CPA. The Legacy Package eliminated the need for their bookkeeper/office manager. The owners decided that they could handle the scanning and check printing on their own and hired some part-time office assistance as needed. Now they have a much better handle on their company because they are actively involved in logging into their QuickBooks and viewing reports on their own, which they never did previously. The savings have been significant, which was especially important for them in the depressed construction market.

	Monthly	
	Before	After
Bookkeeper/Office Manager	\$ 2,600	\$ -
Part-Time Office Assistant	-	500
Taxes, Benefits and Workers Comp	289	55
Software	25	-
Payroll Outsource	80	-
Year End Accounting & Income Tax Preparation	225	-
Legacy Package	-	1,400
Total	3,219	1,955
Annualized Costs \$	38,623	\$ 23,460
Annual Savings \$	15,163	
Percentage Savings	39%	