

XBert 



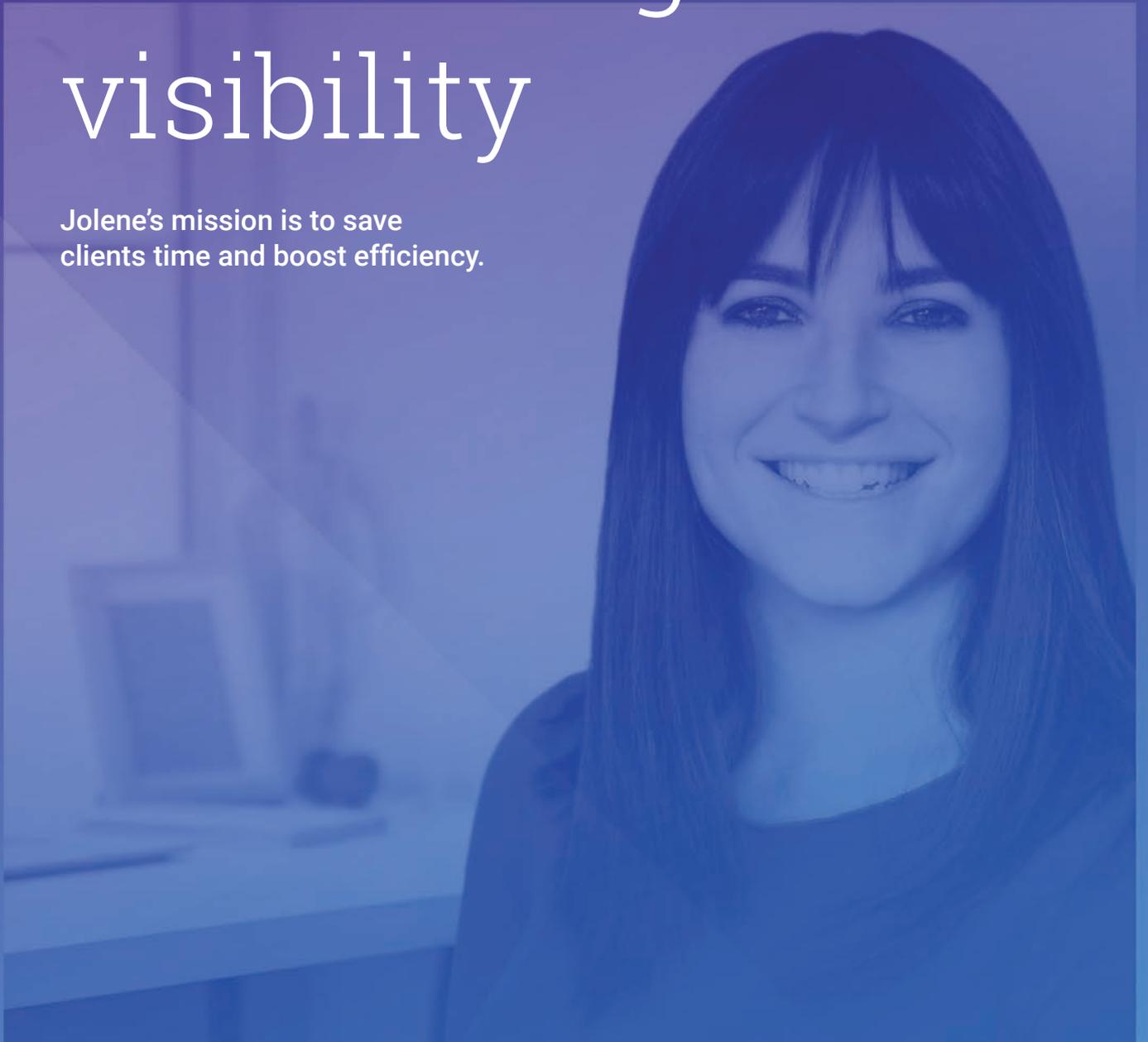
centegrity

bookkeeping
and business
mentoring

**CASE
STUDY**

Next level **smarter** digital visibility

Jolene's mission is to save
clients time and boost efficiency.



Next level smarter digital visibility

In Jolene's own words, she "loves numbers and is all about process and better business"

Jolene Lutman is a business analyst, productivity proponent and tech-focused bookkeeper whose mission is to save clients time and boost efficiency. Jolene's passions and expertise perfectly meld as she manages bookkeeping for clients and also provides business mentoring, financial insight and process automation recommendations. Her search for innovative solutions brought her to XBert; which provides complete visibility, streamlined processes, and enables her to support and advise clients in more ways.

Jolene is the Director of Melbourne-based practice Centegrity Bookkeeping and Business Mentoring
<https://centegrity.com.au>.

With XBert, clients and myself have streamlined our processes. I have full visibility across the entire practice and have peace of mind that we are providing an excellent standardised service. In wanting to be more efficient and streamlined, I realised I needed smarter digital visibility of managing Centegrity's increasing workload and client management.

As a business analyst, I'm passionate about efficiencies, effective processes and easy automation for clients and myself.

Centegrity is a registered BAS agent and a Xero Silver Partner and certified advisor. Jolene and her team specialise in delivering customised solutions for clients in healthcare and professional services".

In Jolene's own words, she "loves numbers and is all about process and better business". Before founding Centegrity, Jolene put her Science and Information Systems degree to good use, spending ten years as a business analyst/project manager for a large, leading Australian bank. Her role was to improve and streamline internal processes and think ahead about company and customer future needs. Jolene attended a webinar showcasing XBert and discovered that XBert's AI audit and process automation save time, reduce stress, ensure data integrity, and foster business health and success through smarter decisions and advice. Jolene knew she had to take a closer look at a tool whose values and focus aligned so strongly with her own.

"XBert is exactly what I was looking for to meet these needs."

Next level smarter digital visibility

XBert reduces manual checks for the Centegrity team, giving them back at least half a day each week reducing manual managerial tasks.

XBert audits and analyses Xero data and attachments hourly and monitors business information warehouses such as the Australian Business Register (ABR) to detect financial risks like anomalies, patterns, errors, entry behaviours and potential fraud.

Jolene has saved hours as XBert decreases the time needed for reviewing staff work and some of the managerial aspects of her role. XBert's email integration enables Jolene to track and triage email requests and manage client relationships.

What was needed?

Centegrity pride themselves on ensuring their bookkeeping is 100% compliant and taking the time to understand the unique requirements of their client's businesses fully,

automate financial processes using the right cloud-based technologies and customised analysis and reporting.

Everyone in business - particularly bookkeepers, accountants and advisors - knows that accurate and up-to-date financial information is vital. With her unwavering commitment to clients, and as an analyst and mentor who offers regular reporting and consultation, Jolene won't budge on her high expectations for a data integrity tool.

However, Jolene was also looking for a smarter way of working and managing clients for her increasingly busy practice.

To achieve these goals, she needed total visibility over work queues and client files, to optimise process flows, maintain consistency and quality work, and have more time for analysis and strategy with her clients.

“ We set up Template Tasks to further improve and standardise internal workflows. The AI risk alerts, especially GST registrations and duplicates, automate time-sapping manual checks and the dashboards tell us what’s in the pipeline, and where to invest our time.”

Jolene signed up to XBert CONNECT to manage multiple businesses, loaded some client files and was impressed by how quickly the system results appeared and the risks and inconsistencies found.

Around the same time, Jolene had a team member starting who was thrown straight into managing bookkeeping tasks using XBert. They had a great starting point with the XBerts (the name for the AI business alerts), surfacing what needed review and fixing.

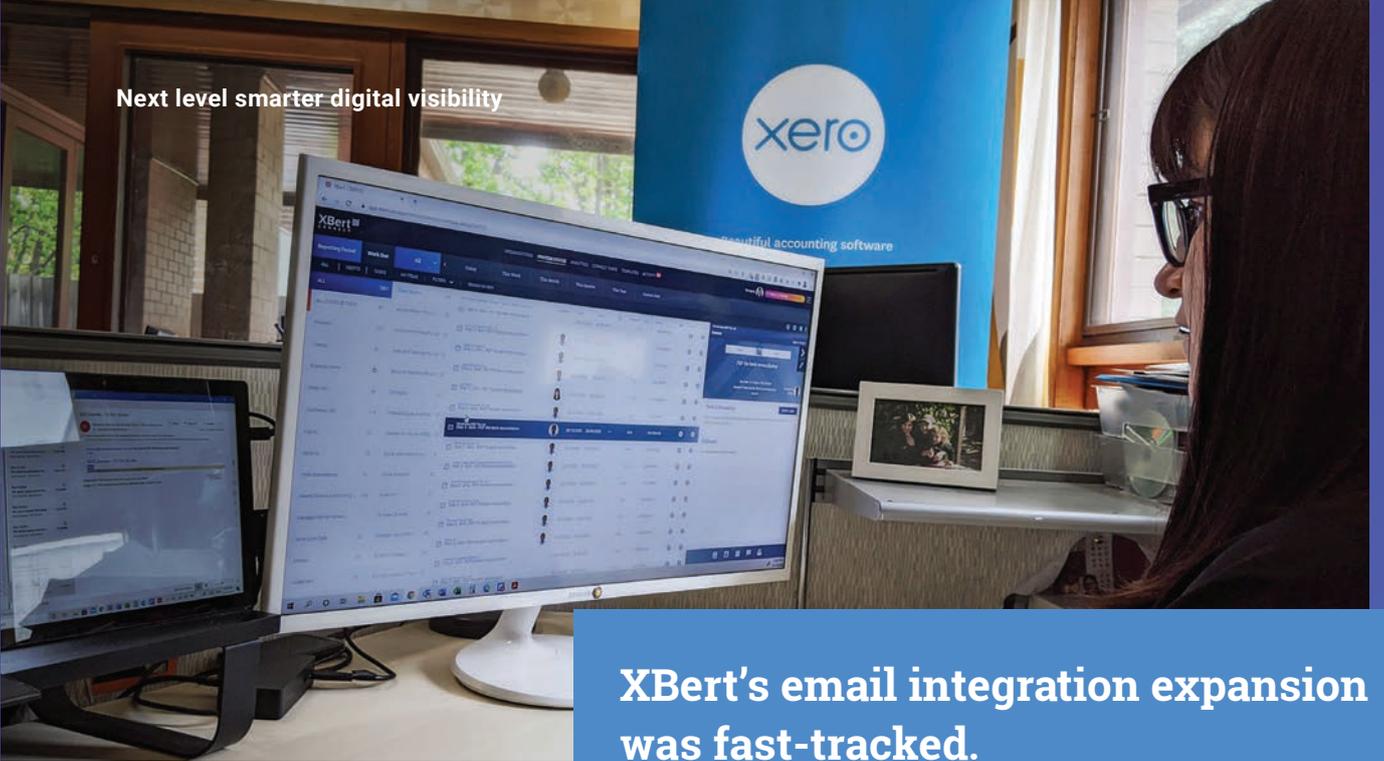
What XBert does for Centegrity

XBert’s hourly data audits and automated checks free the Centegrity team to spend more time providing value for clients and gives them confidence in the bookkeeping and reports.

Jolene used CONNECT’s Template Task and AI process automation to standardise services and workflows. Knowing these templates are in place and are followed, reassures her that the work is consistent across clients and that nothing gets missed.

Jolene has XBert open all day. The various dashboards make it easy for her to monitor and manage tasks, team workload, and client risks and business health. At a glance, she knows what needs attention and where to invest time.

Out of the box, XBert gave Jolene and the practice the visibility she wanted and boosted efficiencies and opportunities to support her clients’ businesses.



Next level smarter digital visibility

XBert's email integration expansion was fast-tracked.

When chatting with XBert co-founder Aaron Wittman, who also leads the data and technology development areas, Jolene's comments on her specific challenges around client relationship management impelled Aaron to come up with a solution.

Now, Jolene has visibility over her entire practice and client relationships.

The results – Productivity gains, smarter visibility and client management

Xero and XBert together deliver the smarter, streamlined visibility Jolene sought in a one-stop-shop.

She can be more proactive with clients and advisory conversations, making use of the time she used to spend reviewing work.

Emails sent by the clients are triaged and can be used to create tasks. That task is associated with that email thread, allowing thorough tracking, including any emails that make up part of her reporting and compliance process.

At any time, Jolene knows what's in the pipeline, what's overdue, and staff or client areas that need attention, and she can track and manage client relationships effectively.

The streamlined, AI automated processes and audits, gives her peace of mind that the data and insights are accurate and that Centegrity is consistently providing an excellent service.

Next level smarter digital visibility

“I worked with the XBert team to implement our email integration and now we turn emails into tasks by forwarding them into XBert. Knowing our emails have been actioned or the client has been responded in the one system is fantastic!”

The future of Centegrity + XBert

Jolene aims to help clients streamline their financial processes and make improvements so they can do what they're good at and the things that made them want to start a business.

“ We're so happy that XBert enables her to achieve those same goals to benefit her own business.”

Jolene's uses all of the collaboration, task and workflow features to run her practice efficiently, and now she's ready for growth.

In addition to working closely with Aaron on the email integration expansion, Jolene and her colleagues at Centegrity have been incredible partners and consultants on the development of XBert's roadmap of business alerts, features and functionality.

According to Jolene, she feels like part of the XBert team and loves how XBert takes on feedback and implements changes

With Jolene's expertise and knowledge, and our other advisory partners sending us ideas, we'll continue to expand XBert so that businesses worldwide are alerted to financial risks before it's too late and succeed with accurate advice and smarter decisions.

Discover what XBert can do for your business by starting a free trial now.