CASE STUDY

Modernizing the Finance Function for a SaaS based company

60–80 Hrs	~1 Week	2 Roles	2,500+
Finance time saved / month	Month-end close cycle	Absorbed without backfilling	Customer records standardized

THE CHALLENGE

- Two experienced accounting team members former, leaving a critical gap to bridge without disrupting operations or adding headcount.
- Finance ran on a complex legacy ERP system with manual, error-prone processes.
- Revenue recognition was inconsistent, and customer records were duplicated across CRM and accounting platforms.
- Slow, manual invoicing limited leadership's real-time visibility into the business.

WHAT WE DELIVERED

- Led the migration from Great Plains to QuickBooks Online, improving accounting efficiency and reducing internal accounting team workload by approximately 60–70%.
- Implemented deferred revenue accounting and corrected five years of historical schedules.
- Identified, reviewed, and merged 2,500+ duplicate customer records; worked on bringing consistency between zoho records & Quickbooks for unified reporting.
- Automated recurring processes and streamlined the sales-to-invoice workflow, including real-time invoicing and shipping documentation.
- Built customized and automated commission, royalty, and sales performance reporting.
- Organized five years of financial records for audit and investor readiness.

THE IMPACT

By absorbing the work of two experienced accounting professionals, the client avoided the cost and time of recruiting, onboarding, and training — while gaining a dedicated team of specialists. Leadership now receives timely, decision-ready financial information and can focus on strategic growth while CLOUDIT runs the day-to-day finance function.

BUSINESS OUTCOME

- ✓ **60–80 hrs of finance time saved every month**
- ✓ **Month-end close cut to ~1 week**
- ✓ **Two accounting roles' cost avoided**
- ✓ **Unified, investor-ready financial data**