

Success Story

Sage helps take award-winning practice to infinity and beyond

Scottish accountancy firm, Infinity Partnership, accelerates digital transformation with Sage Accounting



In a crowded market, Infinity Partnership does more than stand out. With many awards under its belt, the multi-disciplined accountancy and business advisory practice actively leads the way.

A decade old, its customer service and dedication to clients is key to the company's reputation. Servicing everything from start-ups to large businesses and PLCs, the approach is always the same: positive, proactive, and rooted in expertise.

Key outcomes

- 2,000 clients seamlessly migrated to the cloud with Sage Accounting
- Productivity and time savings using AutoEntry to process receipts
- 70% faster to process individual invoices
- Enabled a more consultancy-based relationship with clients
- Enhanced firm's reputation for a customer-centric approach to accountancy

Company
Infinity Partnership

Location
United Kingdom

Industry
Accountancy

Sage Products
Sage Accounting, AutoEntry



About Infinity Partnership

Infinity Partnership is a decade-old Scottish accountancy firm servicing everything from start-ups to large business and PLCs. They have a reputation for their customer service and dedication to clients.

The Sage logo, consisting of the word "Sage" in a bold, black, sans-serif font.



Flexibility and scale

With an important reputation to uphold, Infinity Partnership had some tough criteria when it came to evaluating the right software for its practice. Having been burnt in the past by solutions that created bank feed processing issues resulting in errors and downtime, the company was keen to find the perfect fit for the business and its clients.

Flexibility, value for money, and user-friendliness were high on the list. “We won’t take anything to clients that we are not completely sure is fit for purpose,” says Greg Houston, Associate Director at Infinity Partnership.

The choice was between Sage and other cloud accounting providers, but several influencing factors helped the company select Sage Accounting. Firstly, Infinity Partnership wanted a cloud-based solution aligned with its cloud-future strategy and increased digital presence to speed up response times and provide an even better service to clients.

Secondly, with over 2,000 clients, the firm needed a solution that would migrate seamlessly to the cloud. Having a long-standing relationship with Sage, their Practice Success Manager, Hannah Taylor, understood the complexities they faced and assured the team that they would have the tailored support they needed.

Thirdly, with Sage investing in more events local to their practice, Infinity Partnership gained more exposure and the confirmation they needed as to how Sage Accounting would integrate within their business and support their long-term vision.

Seamless implementation

The Infinity Partnership and Sage teams worked closely together to ensure a smooth transition to Sage Accounting. The ongoing support, communication, and insight that Sage provided was a key ingredient in the rollout’s success from start to finish.

“Our Practice Success Manager Hannah has watched us develop and knows our needs, which is really important,” says Greg. “We have always had the ethos of ‘if you’re open with me, I’ll be open with you’, and that honesty is refreshing,” he adds.

The rollout involved moving clients over from competitor platforms to Sage, so it was crucial to ensure there was the right level of communication and understanding for the practice, and their clients. With the Sage marketing team’s guidance on how best to position and sell the benefits of moving to Sage Accounting, client reaction was universally positive.



Sage has helped productivity remain consistent when Infinity Partnership began remote working.

Boosting efficiency and saving time

For Infinity Partnership, one of the main benefits of switching to Sage Accounting is that the team can track invoices, accept payments, and record transactions in one place. This instantly reduced internal email traffic between teams as well as external communication with clients, saving valuable time across the business.

In particular, the addition of Sage's automated data entry platform, AutoEntry has been a dramatic change for the team when it comes to invoices and receipts. "Our junior employees use it every day, and it's saving them hours each week because they don't have to manually input data or chase clients to see if everything is reconciled," explains Greg.

For some of Infinity Partnership's clients, it used to take two or three days per month to go through invoices and receipts; now, the team can do it in half a day. Processing individual receipts now takes around 50 seconds instead of three minutes. "Rolling out AutoEntry has been a real no-brainer. Our clients love the boost in productivity it's bringing," says Greg.

Real-time overview

The increased level of productivity has remained consistent, even during the pandemic. Having Sage Accounting, with the accessibility and flexibility of the cloud, has been a real asset and enabled remote working, allowing the company to adapt and continue to support its clients.

With Sage Accounting, the practice operates efficiently, no matter where the team or its clients are working from. "Now, when I get a call from a client, I can quickly jump on Sage Accounting wherever I am and instantly see a complete overview of our work. Previously, it may have taken a day or two to address the request," explains Greg.

Customer centricity

Customer service is key to everything Infinity Partnership does, and the firm is keen to protect its customer-centric reputation.

According to Greg, another key benefit for Infinity Partnership is that they can now spend more time consulting with clients and adding value, rather than just working on the accounts.

"Without the need to spend hours every month inputting data and doing other manual tasks, our clients are seeing big benefits from us being able to spend more advisory time with them," he explains.

The reaction from Infinity Partnership's 2,000 clients to the cloud-first software has been unanimously positive. The simplicity of Sage Accounting's user interface means that the majority have been quick to see the benefits; they can upload invoices themselves with the knowledge the payments will be processed quickly, meaning they have more time to focus on strategy and growth.

"The biggest plus for us is seeing how much additional benefits our clients are seeing," says Greg. "Client satisfaction is our biggest KPI, so being able to move from being processors to business partners and offer them proactive advice is huge. Sage Accounting has played a key role in this," he concludes.



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Greg Houston

Associate Director, Infinity Partnership

A strong partnership

Sage continues to play a critical role in the practice's day to day operations and recently winning the coveted Accounting Firm of the Year title at the Sage Impact Awards has cemented the strength of the partnership. “The recognition of a respected global software brand like Sage is a huge honour for Infinity Partnership and highlights just how much we have developed as a firm in recent years,” says Greg.

Thrilled to have won, the firm says the accolade has helped to increase awareness of Infinity Partnership and they are looking forward to entering the awards again next year.

“We have great relationships with the Sage team and it's important that the success and value of these relationships are acknowledged with events such as the Sage Impact Awards. It genuinely feels like Sage are committed to helping us better serve our clients,” Greg adds.

