

# Key Signs Your Finance Processes Are Holding Back Your Recruitment Business

As a finance professional in a recruitment firm, you're feeling the pressure: Long hours chasing data between financial, CRM, ATS, and time and billing apps. Endlessly juggling invoices, payments, and reports.

These manual processes are draining your time, delaying billing, and making it harder to get a clear picture of your firm's financial health.

If you're tired of feeling like you're always catching up and never ahead, this checklist is for you.

## **CHECK ALL THAT APPLY**

#### ■ Reporting takes too long—and is already outdated

By the time you've pieced together spreadsheets for P&Ls, aged debt, or placement profitability, the information is old—and often inaccurate.

#### WHAT TO DO:

Use live dashboards and pre-built financial reports for instant insights.

#### ☐ Your invoices are often delayed or disputed

Manual processes increase errors. If you're re-issuing invoices due to errors, you're delaying cash flow—and clients may question your professionalism.

#### WHAT TO DO:

Generate accurate invoices instantly using real-time, synchronized data.





#### Paying your suppliers feels like a never-ending admin task

You experience delays and inefficiencies from manually entering supplier invoices and chasing approvals through email or paper-based processes.

#### **WHAT TO DO:**

Automate your accounts payable to streamline invoice processing and approval workflows and gain real-time visibility into your payables.

#### **☐** You spend hours reconciling data between systems

Your finance team copies data between spreadsheets, CRM tools like Bullhorn, and time and billing systems.

#### WHAT TO DO:

Automate data syncing between systems to save hours every week.

# Manual processes and limited visibility are putting your financial compliance at risk

You struggle to maintain a reliable audit trail and spend too much time on manual checks and reconciliations.

#### WHAT TO DO:

Automate your key financial processes and get a real-time, tamper-proof audit trail to keep you compliant and confidently ready for audits.

#### ■ Disconnected systems are slowing you down

Your CRM, ATS, finance system, time and billing tools, and spreadsheets operate in silos.

#### WHAT TO DO:

Connect your key systems and automate data flows to eliminate duplication, improve accuracy, and gain real-time insight across your business.



# FOR MULTI-ENTITY AND MULTI-CURRENCY COMPANIES

Manually consolidating financials across entities and currencies takes days and is prone to inconsistencies.

#### WHAT TO DO:

Use automated multi-entity consolidation tools with built-in currency conversion and local compliance support.

#### ■ Managing multiple currencies and tax rules is difficult

You struggle to navigate tax structures across jurisdictions.

#### WHAT TO DO:

Implement a system that supports multi-currency, multi-tax compliance across countries to eliminate complexity and risk.

#### ■ You lack visibility across global operations

Your siloed systems across regions make it difficult to get a complete, realtime view of global performance.

#### WHAT TO DO:

Centralize data from all entities on one unified platform with real-time dashboards and reporting.

#### ■ Intercompany transactions are manually reconciled

Reconciling intercompany charges and eliminations in spreadsheets slows down close processes and increases audit risk.

#### WHAT TO DO:

Automate intercompany transaction management and eliminations to speed up group reporting and reduce errors.

## THE BOTTOM LINE

If you checked 5 or more boxes, it's time to explore a smarter, faster way to run finance.

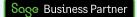
Sage Intacct for Recruitment is a powerful financial management solution built specifically for recruitment firms to address real-world challenges in billing, compliance, and operations—helping you bill faster, stay compliant, gain real-time financial insight, and scale your firm without adding admin overhead.

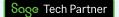
Sage Intacct for Recruitment gets even better with **Saltbox**, Vision33's market-leading integration platform. Saltbox seamlessly connects Sage Intacct to your CRM, time and billing, and payroll systems to create one fully integrated, efficient ecosystem.

### **ABOUT VISION33**

# Vision33: Empowering Recruitment Firms With Sage Intacct

Vision33 is a multi-award-winning Sage Intacct partner and Sage Platinum Club member, renowned for its expertise in implementing, integrating, and supporting Sage Intacct. With hundreds of successful implementations, Vision33 helps recruitment firms streamline their financial operations, enabling them to focus on growth and strategic initiatives.





Contact us today to learn more about Sage Intacct for Recruitment.

contact@vision33.com vision33.com