

Key Signs Your Finance Processes Are Holding Back Your Recruitment Business

As a finance professional in a recruitment agency, you're feeling the pressure: *Long hours chasing data between spreadsheets, CRM systems, and time-tracking tools. 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 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Reporting takes too long—and is already outdated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, synchronised data.



You have no real-time view of your cash flow

You're forecasting cash flow using static spreadsheets.

WHAT TO DO:

Use real-time visibility tools to monitor income, outgoings, and profitability as they happen.

It's difficult to track profitability by client or placement

You don't know which placements are actually profitable, and your current system doesn't tell you.

WHAT TO DO:

Get granular visibility into profit by client, recruiter, or role with multidimensional reporting.

Month-end close is a manual burden

Your finance team chases spreadsheets, emails, and paper trails to close the books.

WHAT TO DO:

Automate your workflows and adopt a continuous close approach with real-time reconciliation to reduce manual effort and speed up your close process.

You don't trust your data

Team members use multiple versions of "the truth", so no one knows the real numbers.

WHAT TO DO:

Centralise your data to get a single, accurate source of truth.

You've hired more people to handle admin—not growth

Instead of making strategic hires to help with growth, you're hiring more spreadsheet wranglers.

WHAT TO DO:

Automate repetitive tasks and free up your team for high-value work.

□ **Paying your supplier 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 & billing systems like RSM InTime.

WHAT TO DO:

Automate data syncing between systems to save hours every week.

□ **VAT compliance is becoming more complex under HMRC's Making Tax Digital rules**

You spend too much time preparing VAT returns manually and worrying about Making Tax Digital compliance.

WHAT TO DO:

Use a financial management solution that's MTD-compliant out of the box, automatically generating and submitting VAT returns to HMRC to save time and reduce compliance risk.

□ **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 & 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 COMPANIES WITH MULTI-ENTITIES AND OPERATIONS OUTSIDE THE UK

❑ **Consolidations take too long and are error-prone**

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 VAT and other 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, real-time view of global performance.

WHAT TO DO:

Centralise 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 UK recruitment agencies to address real-world challenges in billing, compliance, and operations—helping you bill faster, stay compliant, gain real-time financial insight, and scale your agency 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 & billing, and payroll systems to create one fully integrated, efficient ecosystem.

About Vision33

Vision33: Empowering Recruitment Agencies 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 agencies streamline their financial operations, enabling them to focus on growth and strategic initiatives.

As an alliance partner of the Recruitment and Employment Confederation (REC), Vision33 is deeply committed to the recruitment industry. We collaborate with REC to provide valuable business advice and leadership, supporting both their members and the broader recruitment sector.

With Vision33 and Sage Intacct for Recruitment, agencies will strengthen their financial foundation and embark on a digital transformation journey that leads to a healthier, more scalable, and more insightful way of managing their businesses.



Sage Business Partner

Sage Tech Partner

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

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