



Accounting & Bookkeeping Services for CRM Adoption Company

PROJECT DETAILS

 Accounting

 Feb 2023 - Ongoing

 Less than \$10,000



"They are great at what they do!"

PROJECT SUMMARY

Meru Accounting provides accounting and bookkeeping services for a CRM adoption company. The team uses Xero, Stripe, and Wise. They also perform account reconciliation and business activity statement filing.

PROJECT FEEDBACK

The client is pleased with Meru Accounting's work. The team successfully reconciles the client's accounts every two weeks, delivering tasks on time. Moreover, they're responsive to the client's questions. Their members are highly communicative. Overall, the partnership has been truly successful.



The Client

Please describe your company and position.

I am the Owner of Pure Proposals

Describe what your company does in a single sentence.

We help businesses leverage the power of PandaDoc & HubSpot to drive sales and revenue.

The Challenge



Benjamin Reimann
Owner, Pure Proposals

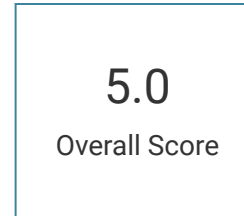


IT Services



Melbourne, Australia

CLIENT RATING



Quality: 5.0

Schedule: 5.0

Cost: 5.0

Would Refer: 5.0





The Approach

How did you find Meru Accounting?

Upwork

How many teammates from Meru Accounting were assigned to this project?

2-5 Employees

Describe the scope of work in detail. Please include a summary of key deliverables.

Monthly bookkeeping services with Xero, Stripe, and Wise.
Reconciliation of accounts and filing quarterly BAS.

The Outcome

What were the measurable outcomes from the project that demonstrate progress or success?

Every 2-ish weeks my accounts are reconciled by Meru. They are great at what they do!

Describe their project management. Did they deliver items on time? How did they respond to your needs?

They do deliver on time and are always timely to respond to my queries.

What was your primary form of communication with Meru Accounting?

Email or Messaging App





Meru Accounting

What did you find most impressive or unique about this company?

They are very communicative, and I appreciate the consistent reporting on my business.

Are there any areas for improvement or something Meru Accounting could have done differently?

The reports are comprehensive and sometimes a bit confusing for me. But to be honest, this is more a me problem. If there's any possibility for improvement, it might be a summary of each month's data in a very easy and quick-to-understand format.



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