

# Mutual Vision Sees a Clear Financial Picture With Sage Intacct

Sage



Software company graduates from Sage 50 to Sage Intacct,  
the definitive choice for modern financial management.

  
Vision33

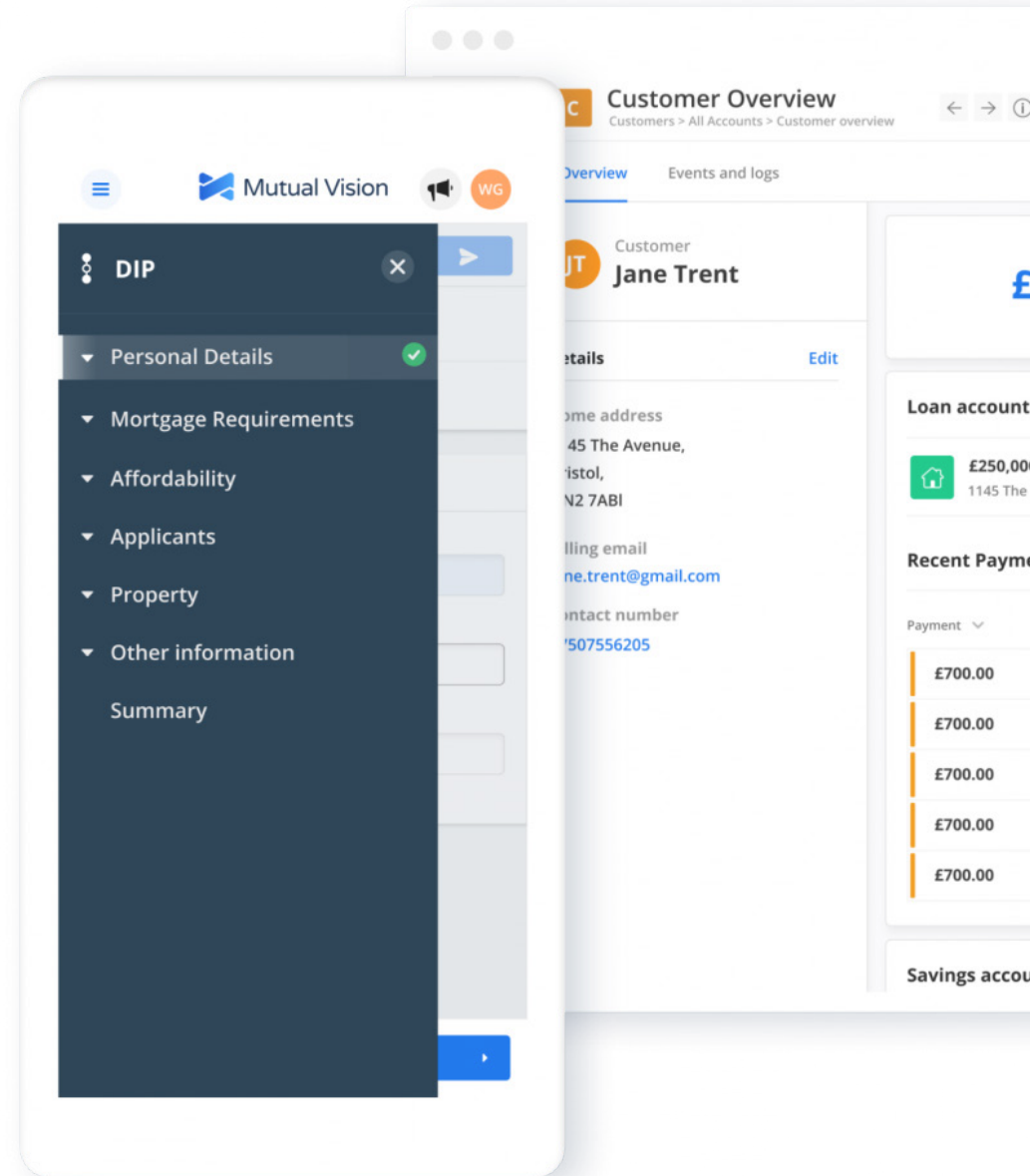


## About

Located in Wilmslow, England, [Mutual Vision](#) is a software company that builds digital banking platforms and partner ecosystems for specialist lenders in the United Kingdom. The company's highly adaptable platform gives financial institutions everything they need to offer their customers superior loans and savings products.

Mutual Vision's solutions include back-end servicing of customer loans and savings accounts, a branch teller, a customer-facing eSavings portal, and an intermediary-facing loans application portal.

Its innovative products, thriving partner ecosystem, and expert professional services help financial institutions streamline processes and elevate the customer experience.



## Attention to Detail

Financial executives are becoming partners in their companies' strategic growth—and technology has never played a more critical role.

When Katrina Harman joined Mutual Vision as CFO and executive director, she was eager to find new accounting software.

Mutual Vision's small finance team used Sage 50, a trusted brand's desktop accounting software with cloud connectivity.

Sage is the leader in accounting, financial, HR, and payroll technology for small and mid-sized businesses. Katrina and her team liked how easy Sage 50 is to use, but the entry-level software no longer met Mutual Vision's needs.

In addition to reporting limitations, Mutual Vision's finance team was challenged with manual tasks like sending emails for authorizations.



*I wanted to start providing more detailed reporting on product costing," Katrina explains. "We needed to see actual product profitability and detailed reporting by department, and Sage 50 doesn't allow for that level of detail."*

*Katrina Harman,  
Chief Finance Officer*

# A Natural Next Step

Mutual Vision needed modern accounting software that streamlines financial processes, automates workflows, and provides unparalleled visibility—and Sage Intacct was the clear choice and natural next step.

*“We looked at a few products,” Katrina says, “but we thought it would be easier to keep within the same product line.”*

Built by accountants for accountants and born in the cloud, Sage Intacct is a financial management solution that frees finance teams to focus on valuable strategic initiatives. And because it’s a modular solution, Sage Intacct offers the functionality Mutual Vision needs—and none it doesn’t.

*“Sage Intacct will grow with us,” Katrina notes. “We could buy what we needed immediately and can add to it later.”*



# Smooth Implementation, Steadfast Support

Based on Sage's recommendation, Mutual Vision partnered with Vision33 to implement and provide long-term support for Sage Intacct.

Vision33 is an award-winning Sage Intacct partner and Sage Platinum Club member. With hundreds of successful Sage Intacct implementations, Vision33's trained and certified consultants know the solution inside and out and have specialized insight to help companies transform accounting frustrations into success and strategic growth.

Lewis Chapman, Mutual Vision's financial controller, joined the company as the Sage Intacct project was underway.

*"The implementation was quite smooth," Lewis says. "Vision33's consultant has been really helpful, patient, and understanding."*

*"He's really good at taking the boredom out of the process," Katrina adds. "If we ran into challenges, he came up with different ways to fix them. He's been really supportive."*



*Lewis Chapman,  
Financial Controller*





## Freeing Time in Finance

Thanks to Sage Intacct's robust dashboards and customizable reporting, Mutual Vision's finance team has the visibility it needs into financial and operational data.

*"We have a new management team, and everyone needs that level of detail," Katrina says. "We're also going through a significant period of growth. We needed that extra information to make more informed business decisions."*

There's also much less manual effort. Previously, employees sent expenses through email, and finance would raise them in Sage 50. Now, employees can raise expenses directly in Sage Intacct.

*"We're also letting businesses raise purchase orders themselves," Lewis says. "That frees time in finance."*

# Better Data for Better Decisions

Sage Intacct is also beneficial outside of Mutual Vision's finance team.

*"We have a manager who works on the project side, building projects and tracking how much time has been booked," Lewis says. "He didn't use Sage 50 at all, but he quite likes the dashboards and reports we can get out of Sage Intacct."*

It's only fitting that a software company should use the best software. As Mutual Vision continues its exciting growth, Sage Intacct—the definitive choice for modern financial management—will help fuel that growth with real-time data for confident decisions.





Vision33 transforms business processes and results for customers by delivering value through the promise of technology and its benefits for growing businesses. For over 30 years, Vision33 has helped companies integrate and automate their business processes and applications to better serve their customers, employees, and stakeholders. The technologies may have changed drastically in 30 years, but Vision33's mission has never wavered.

With over 1,000 customers worldwide, Vision33 helps manufacturers, distributors, service firms, and SaaS businesses outperform their competition and lead their industries with successful technology investments.

With nearly 500 employees, Vision33 offers product expertise, business experience, and innovative technology leadership. Whether a global company with 100 subsidiaries or a small business, Vision33 works alongside every customer to meet their goals.

Vision33 also has formal partnerships to resell, implement, and support leading ERP applications, is a leader in cloud deployment, and has developed exclusive products, including Saltbox and iDocuments.

*For more information about Vision33, visit [www.vision33.com](http://www.vision33.com)*

**Contact your nearest Vision33 sales office to discuss how we can help transform your business.**

**United States**

7545 Irvine Center Drive,  
Suite 200  
Irvine, California 92618  
Tel: +1 949 420 3300  
contact@vision33.com  
[www.vision33.com](http://www.vision33.com)

**Canada**

210 Water Street, Suite #400  
St. John's, NL A1C 1A9  
Tel: +1 709 722 7213  
contact@vision33.com  
[www.vision33.com](http://www.vision33.com)

**Europe**

1 Heathgate Place,  
Agincourt Road  
London, NW3 2NU  
Tel: +44 (0) 20 7284 8400  
contact@vision33.co.uk  
[www.vision33.co.uk](http://www.vision33.co.uk)

