

Sageworks Valuation Solution.

Case Study

Improve Productivity with Sageworks Valuation Solution

OVERVIEW

Public accounting and business consulting firms like Brickley DeLong rely on Sageworks Valuation Solution to provide flexibility to collaborate internally and externally on valuation engagements and boost efficiency. For Brickley DeLong, the built-in report writer and web-based access streamlined the process and provided confidence that valuations are accurate and abiding by SSVS No. 1 standards.

CHALLENGE

Brickley DeLong, a public accounting and business consulting firm with clients throughout West Michigan, has a growing business valuation service. With valuation staff in multiple offices and often on the road, the firm needed the flexibility to provide everyone with access to projects as they advanced to completion. The firm also wanted a more efficient way to generate and edit valuation reports to improve realization rates and to create an accurate calculation in compliance with industry standards.

SOLUTION

Brickley DeLong replaced the CD-based valuation software it was using with the web-based *Sageworks Valuation Solution*. An unlimited number of partners and staff who are traveling, at home or at any office can now access and collaborate on a project as needed. The built-in report writer, modeled after SSVS No. 1 guidelines, automatically converts raw data to a final report while providing comprehensive control over report language and content.

“The report writer is seamless. We also do a lot less checking than we used to because we have all the confidence that the valuation is done right. We think the more we use Sageworks Valuation Solution, we’re going to find more and more efficiencies.”

Thomas E. Vereecke

Partner and CPA

BRICKLEY DeLONG
CERTIFIED PUBLIC ACCOUNTANTS

ABOUT BRICKLEY DeLONG

Brickley DeLong is a full-service public accounting and business consulting firm serving the West Michigan community with offices in Grand Rapids, Muskegon and Hart. For over 35 years, their focus has been on their clients, their people and their community.

Cut project time by
as much as **25%**.

After using Sageworks Valuation Solution on just four jobs, Vereecke estimates the firm is cutting project time by as much as 25 percent and boosting realization rates.

RESULTS

“Problems with jobs happen at the most inopportune time, and Sageworks Valuation Solution alleviates a lot of the angst of ‘Gee, I don’t have my computer with me,’ or ‘We only have so many copies of the software.’ It has made us better communicators,” says partner Thomas E. Vereecke, CPA. “I’ll get something emailed to me, and I can access the project and look at the detailed calculation even if I’m at another office, as opposed to waiting until I get to my machine at my location. It’s very easy to use; it’s intuitive. I also use it when I’m selling a valuation to give the prospect a feel for what we look at. They get to see why and how the job is billed.”

After using Sageworks Valuation Solution on just four jobs, Vereecke estimates the firm is cutting project time by as much as 25 percent and boosting realization rates.

“Where we pick up most of our time savings is in the conversion of raw data to the final report. The report writer is seamless. We also do a lot less checking than we used to because we have all the confidence that the valuation is done right. We are getting close to having write ups, meaning that we realize more than what our standard rate is. We think the more we use Sageworks Valuation Solution, we’re going to find more and more efficiencies.”

BENEFITS & FEATURES

- ✓ Offer a value-added service that can win new clients and retain existing clients.
- ✓ Collaborate securely and communicate effectively with partners through a web-based platform.
- ✓ Save time and money with a built-in report writer that simplifies reporting after each valuation and offers comprehensive control over report language and content.
- ✓ Manage projects, store files and track documents in one secure, globally accessible location.
- ✓ Use three core valuation approaches with flexibility to ensure the most accurate value possible.
- ✓ Forecasting is simplified to only one click, allowing users to adjust variables to project a variety of “what if” analyses.

ABOUT SAGEWORKS VALUATION SOLUTION

[Sageworks Valuation Solution](#) is a web-based platform enabling business valuation professionals to streamline workflow, increase realization rates and offer advisory services. Modeled after [SSVS No.1](#) standards, the software follows the income, market and asset approaches to generate an accurate, defensible value.

If you would like more information, please contact:

valuationsales@sageworks.com

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- Email valuationsales@sageworks.com
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