

Strategic Software Utilization: A Transformational Journey with Wheelhouse Property Management



CHALLENGES

1

Navigating Complex Software Functionality

Wheelhouse Property Management was faced with the intricate task of fully understanding and leveraging the capabilities of their existing software for optimal performance.

2

Seeking Enhanced Reporting Capabilities

The team needed to empower themselves with more robust and reliable reporting features to enable accurate, on-the-spot financial tracking and decision making.

3

Managing Accounting Firm Migration Challenges

In the process of transitioning their accounting operations, Wheelhouse encountered unexpected setbacks, requiring them to navigate through and resolve migration-related complications.

Wheelhouse was grappling with leveraging the capabilities of their existing software, desiring more robust and reliable reporting features, and navigating unexpected setbacks in the migration process with their previous accounting firm. Working with BAS, Wheelhouse was able to effectively harness the power of their software, streamline their reporting processes, and successfully manage the transition of their accounting operations, ultimately enhancing efficiency and business productivity. Moving forward, the transformation has empowered Wheelhouse to not only confront present-day challenges but also future-proof their business operations for sustained growth.

Before collaborating with BAS, 247 faced several challenges. Before partnering with BAS, Wheelhouse Property Management was working with an accounting team that was unable to fully leverage the benefits of the software they were investing in. Despite the wide range of features and capabilities of Breeze Premier, the team faced limitations in harnessing its full functionality. This limited their access to real-time, accurate financial data - a crucial aspect for efficient operations and strategic decision-making.



BUSINESS REPORT



In the face of challenges, Wheelhouse Property Management found a strategic solution in partnering with BAS. Leveraging this synergy, the software became a tool for optimization rather than a hurdle. This partnership was pivotal in not only overcoming immediate issues but also building a robust foundation for future success.

01

Maximizing Breeze Premier Capabilities

Wheelhouse successfully harnessed the full functionality of Breeze Premier, leading to more streamlined and efficient bookkeeping within the software itself.

02

Gaining Real-time Financial Insights

Wheelhouse unlocked robust and reliable reporting features of their software, providing real-time, accurate financial data for strategic decision-making.

03

Overcoming Transition Challenges

With the help of BAS, Wheelhouse managed to rectify the issues that arose during the migration process with the previous accounting firm, ensuring a smooth transition that secured their financial management operations.

RESULTS & INSIGHTS

Wheelhouse Property Management successfully transformed their operational efficiency and reporting capabilities. By fully leveraging the features of Breeze Premier, they've achieved streamlined bookkeeping and robust reporting, which has empowered the team with real-time, accurate financial data. Furthermore, BAS's expertise facilitated a smooth migration process, securing their financial management operations and enhancing their productivity.

75%

Increased speed in monthly closing of books

66%

increased speed in security deposit refunds

75%

Increased speed in accounts payables

Fully confident in all financial reporting

FUTURE

With their newfound efficiencies in bookkeeping, reporting, and operational processes, Wheelhouse Property Management is well-positioned for a future of sustained growth and success. The full utilization of their software has not only resolved their immediate challenges but has also created a robust and agile infrastructure that can adapt to evolving business needs. As they continue to build on these advancements, Wheelhouse is now poised to deliver even higher levels of service to their clients, manage their resources more effectively.

BENEFITS OF PARTNERING WITH BALANCED ASSET SOLUTIONS

BAS's deep understanding of Breeze Premier has empowered Wheelhouse to fully harness the potential of the software, optimizing their bookkeeping and reporting processes. This has resulted in more accurate, timely financial data, aiding strategic decision-making. Additionally, BAS's expert guidance ensured a smooth migration process, rectifying issues that arose with the previous accounting firm and securing Wheelhouse's financial operations. The partnership has not only resolved immediate issues but also equipped Wheelhouse with the tools and knowledge to be self-sufficient, creating a long-term impact on their operational efficiency and strategic agility.



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