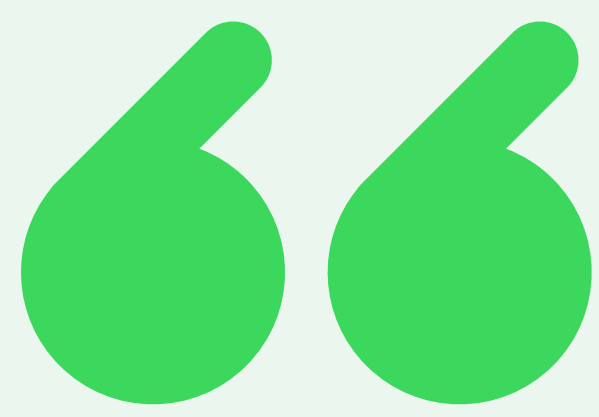




CASE STUDY

How Westcotts and QuickBooks are driving advisory **WITHOUT LOSING THE HUMAN TOUCH**

Smarter automation, stronger client relationships



**We're getting better capabilities for less.
It's just smart business and a straight win.**



STUART PEDLAR

Digital Advisory Lead, Westcotts (FCCA MAAT)



WESTCOTTS

Westcotts, a UK Top 50 accounting firm, has built a 30-year reputation for its partner-led, personalised approach across Devon and Somerset. Despite its size, the firm has remained deeply connected to its clients, offering a local, relationship-driven service that many larger firms struggle to match. After 10 years of working with QuickBooks, Westcotts have their eyes firmly set on the future without losing that personal touch.

"One of our things is that while we're a big firm, we retain close office access for clients. They always have a partner contact and somebody regular that they speak to. That personal service, combined with our depth of expertise, is what sets us apart," explains Stuart, the firm's Digital Advisory Lead.



With 16 offices across the region, Westcotts serves a broad spectrum of businesses, from agriculture and manufacturing to education and the charity sector. This deep regional expertise enables them to provide tailored advice that acknowledges the unique challenges businesses in the South West face, challenges often overlooked by city-based firms.



A lot of our big competitors are city-based, whereas we have a deep-rooted connection to the South West," Stuart explains. "We understand the specific challenges businesses face here, whether it's a big charity, audit, farming, manufacturing, or education - and we tailor our advice accordingly."

"I look at my role as systems management. We deconstruct what they're currently doing and create new systems for them, work out the tech stack of systems and how accounting software can pull into that," he adds.

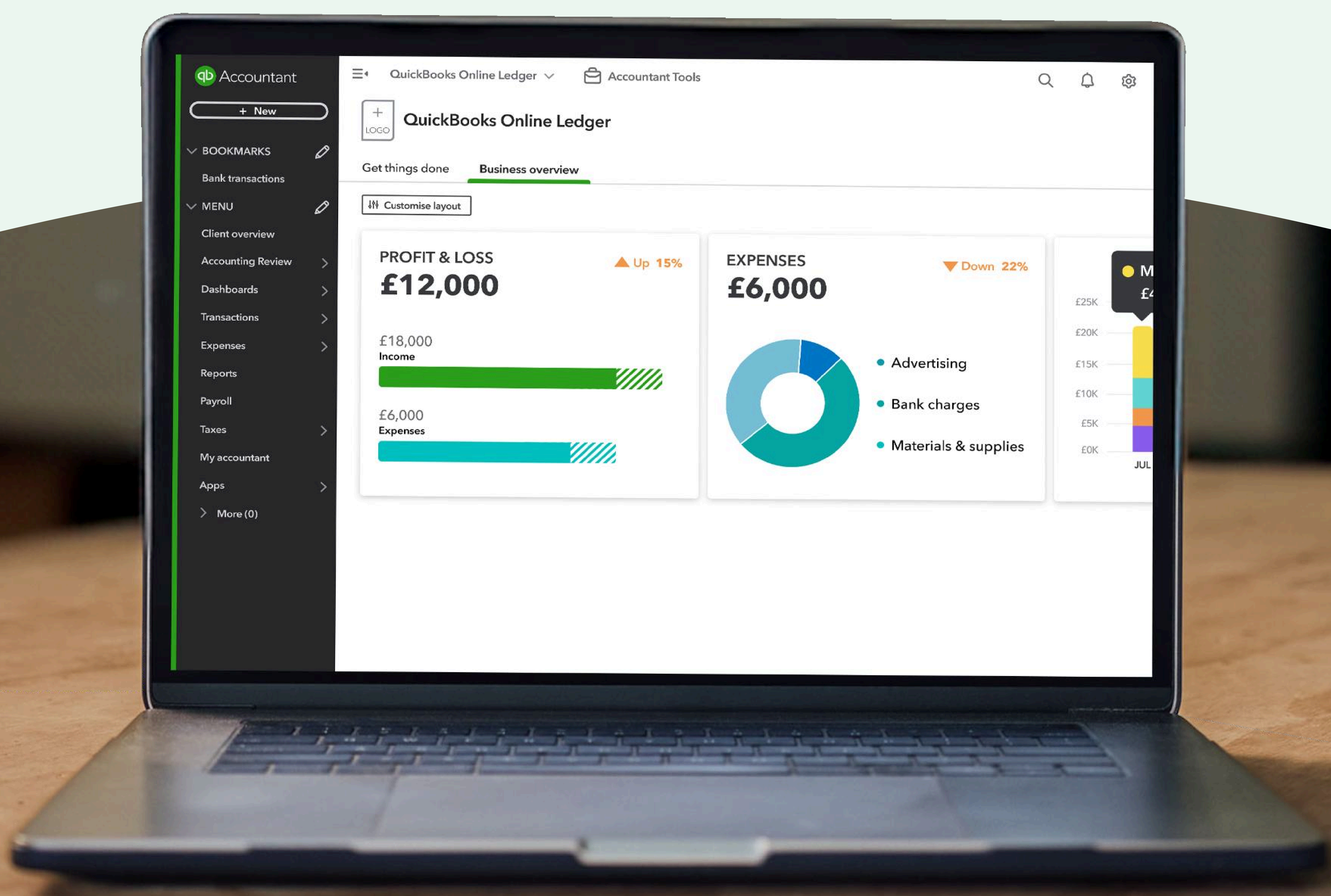
"It's not looking at just compliance. It's looking at it as a valuable tool that businesses can use for any process. **We're always trying to evolve, trying to make things better, quicker.**"

The challenge

With digital adoption accelerating across the industry, Westcotts faced a pivotal moment: How can they continue to lead in the South West while ensuring that clients and internal teams fully embraced innovation?

With the cost vs. feature benefit skewed, they needed a new partner that had **a platform that could scale with them and deliver better functionality, automation, and cost efficiency.**

The firm also knows how imperative a user-friendly technology solution is in delivering **simplified financial management** for both accountants and clients.



The solution

Migrating from Xero to QuickBooks Ledger

Westcotts made a strategic decision to move their ledger clients on to QuickBooks Ledger, yielding immediate results:



"We're getting better capabilities for less," Stuart shares regarding cost savings.



It's just smart business and a straight win. **Besides price, we also moved because of the functionality on offer.**"

"Since Open Banking came in, clients needed to re-consent for bank feeds. Ledger removes the rigmarole—just set it up once, and it pre-populates all the information for us. VAT filing was also a no-brainer," Stuart explains.

The migration process, managed through Movemybooks, was seamless, with zero downtime. "Segmenting clients for migration on our side took the longest, but once that was done, we zipped through. **After a quick data validation check, everything moved in a day's work,**" he recalls.

Automation and advisory: The future of accounting

For Westcotts the focus is always on redefining and elevating their client relationships. The move to add QuickBooks Ledger to their suite, which includes Payroll and QuickBooks Online, is unlocking automation and freeing up time.

01

Shifting from reactive to proactive advisory

"We're not just fixing problems anymore—we're preventing them. Automation catches things early, so clients don't get blindsided at year-end," Stuart points out.

02

Real-time financial insights for better decision-making

"A lot of our clients don't know where they are financially. QuickBooks gives them real-time visibility—suddenly they can see exactly where they are and plan ahead," Stuart adds.

03

Enhanced client segmentation for profitability insights

"We helped clients segment sales and found one part of a client's business was barely breaking even. Without that data, they wouldn't have known," Stuart reveals.

04

Standardised, scalable processes across 16 offices

Historically, new staff would learn by sitting next to experienced colleagues. But with different offices having different ways of working, this wasn't scalable. "With 16 offices to manage, we needed consistency," Stuart says. "Now, everyone has one core QuickBooks certification, making training and support much smoother and standard across the business."

AI, automation & the next generation of clients

While accountants have traditionally been risk-averse, Westcotts recognises how AI is empowering accountants.

"As accountants, we're slightly risk-averse. But AI isn't about replacing us; it's about giving clients a better understanding of their business. Why should businesses enter bills in three systems when QuickBooks already has all that data?"

Stuarts goes on to explain: "While there is skepticism, already we have found plenty of uses for it. Things such as automation of repeated processes has always been there in some form. What we're seeing now is a more human interface. Acknowledging the practical benefits of the day-to-day tasks to drive efficiencies is something we can really get on board with".

Clients increasingly expect mobile-first, and Westcotts sees this as a major growth area for the next year. "The next generation of clients expect everything on their phone. I've spent years practicing and learning accountancy. I don't expect clients to have the knowledge that I do because they shouldn't have to. But AI will give them the visibility to get the results they want," Stuart continues.



Imagine if QuickBooks could tell the bank which payments need making at the push of a button. That's where we see this evolving over the next year," he predicts.



Bringing digital to agriculture

Westcotts also faces one of its biggest technology adoption challenges in agriculture with many clients hesitant to adopt new tools. With the aim of making digital adoption easy and intuitive, Westcotts is looking to transform reluctant adopters into engaged users.

With real-time financial visibility, farmers moved from reactive accounting to proactive business planning. "Agriculture can tend to be behind the curve in terms of technology. But when you show them how easy it is and what they get, it really opens things for them," Stuart explains. "Farmers used to leave tax planning to the last minute. Now, they can see their numbers every single day, **know exactly what they owe, and plan ahead.**"



One farming client initially moved to QuickBooks just for VAT compliance but soon realised it could also track their livestock numbers. **It opened up a world of possibilities.**"

Looking ahead

With QuickBooks as its technology partner, Westcotts is not only transforming its own operations but is also redefining what it means to be a modern accounting firm.

With more time freed up, Westcotts is positioning itself as a leading advisory firm, helping clients make data-backed financial decisions that drive business growth.



QuickBooks isn't just about compliance," Stuart reflects. "I've seen business owners get evenings back with their family. That's the real value. It's always been **easy for us to show user-friendly QuickBooks and how the products have evolved over the years.**"

Activate QuickBooks Online Accountant FOR FREE

[Learn more](#)

