



CASE STUDY:

Strategic switch from Xero to QuickBooks

How Level Accounting
is leveling up



Level Accounting, founded by Dan Ryder, is a Bolton-based accountancy firm serving small businesses, particularly in the construction and trades sectors.

Level Accounting provides bookkeeping, tax returns, payroll, and financial planning—aimed at not only meeting compliance needs but also supporting client growth and efficiency.

The logo for Level Accounting is displayed within a white circular background. The word "LEVEL" is written in a large, bold, black sans-serif font. Below it, the word "ACCOUNTING" is written in a smaller, green, all-caps sans-serif font.

Challenges

Dan, a former IT professional, values efficiency and uses technology as an operational backbone. Dan used to manage most of his clients with Xero. Over time, frequent price increases become a sticking point recognising the importance of providing clients with only the features they need without imposing extra costs, especially as his small business clients typically require straightforward functionality.



“We have a lot of clients and a niche in construction, but they don’t necessarily want to pay a lot. Our ethos is really to give good value for money. The core strategy of Xero didn’t align with our market anymore,” he shared.

Additionally, the upcoming Making Tax Digital (MTD) for Income Tax changes make readiness for compliance a high priority. Dan highlighted that MTD will directly impact his clients: “People who will be impacted by MTD - that’s our core client base. MTD will create more work for us.”

Solution

After a chance meeting with Carl Burton, his now account manager, Dan chose to explore things further after learning about QuickBooks Ledger. The conversation sparked a shift in thinking, and Dan explored what QuickBooks could offer to better fit his firm's and clients' needs.



Key benefits

1. Flexible pricing and cost control

One of the most significant benefits Dan discovered with QuickBooks was its adaptable pricing structure.

"With QuickBooks we can control costs by giving clients what they need. Most of our clients don't need the full Xero. Most of my clients just need invoicing."



With Xero, that meant paying for features they'd never use. We're already saving money by using QuickBooks' Ledger option because we're not paying for unnecessary features.

"It's brilliant that we can bring clients in when we can talk about new things they are seeing, we get to sell other services because they know we're using QuickBooks. It's the value we're bringing," he explained.

2. MTD for Income Tax and future-readiness

With the countdown to the MTD for Income Tax underway, QuickBooks' proactive approach gave Dan peace of mind about handling future regulatory changes smoothly so that Level Accounting could support clients without last-minute disruptions.

"MTD is a massive change, and QuickBooks is ready for it. That gives me confidence—not only for myself but also for my clients. I want to be ready and we need to make sure we are ready for that transition," he said.

3. Professional services support

An essential component of Level Accounting's successful switch was the tailored support from QuickBooks, alongside the use of Move My Books for migration.

QuickBooks support extended to hands on data transfer assistance working closely with migration partners.

Move My Books was a crucial tool, with Dan noting, "Move My Books is very good at telling you if there's an issue. If you migrate one and it's not done quite as it wants it to, it will tell you there are errors you need to check."

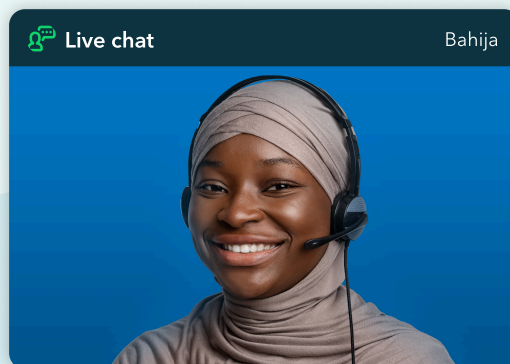
Dan received extensive support from the QuickBooks professional services team, led by Katie Greet, a chartered accountant.

"Katie's training sessions and migration guidance from the team made the transition smooth, and we're not looking back. Katie actually said, 'What do you need?' and we went through and said, I can do this, I can do that, and we finalised on a couple of sessions tailored to us," Dan shared, highlighting the positive impact of the QuickBooks team's involvement.

Although not a primary reason for the switch, Dan found QuickBooks' support exceeded his expectations. With Carl as a dedicated account manager, Dan described consistent, hands-on assistance that felt genuinely supportive rather than sales-driven.



With Xero, getting help felt like jumping through hoops; I had to wait weeks for help. QuickBooks is different. With Carl we discuss the future. It's more about helping us rather than what he can get out of us. It feels like QuickBooks genuinely want to help us grow. When I call, I get answers and real support. It feels like a partnership.



Level Accounting's path forward



With almost 100 clients now switched, Dan reflects, **"We've proved that in a practice like ours, we can move quickly."**



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