

CASE STUDY

Baja Project Management Transfers Bookkeeping Needs to Carbon Group

To ensure its bookkeeping needs are effectively met, Baja Project Management has partnered with Carbon Group's Sydney-based team to keep the business running at full speed.

"Working with Baja Project Management has been an absolute pleasure for everyone involved," said Trudi Yip, Partner at Carbon Group. "Our proactive Account Managers have been able to identify everything the business needs to remain ahead of the game, allowing the client to focus on what truly matters to their organisation."

THE CHALLENGE

As with any fast-growing project management company, Baja Project Management required simplistic (yet practical) bookkeeping to maintain its fast pace of business. Unfortunately, the provider it was outsourcing its needs to did little to support its exponential growth. From sub-par communication to unclear practices, it was evident that Baja Project Management needed to make a change — and quickly, if it wished to continue enjoying such success.

As a result, the company decided it was time to speak to Trudi and the team at Carbon Group.

ABOUT BAJA PROJECT MANAGEMENT

Baja Project Management has the expertise to take the stress out of the building process. Their project management services include planning, design and approvals, budgeting and costing, and construction. Their team members have enjoyed many years in senior management positions with some of the country's leading construction companies. They've also headed project management teams on many major construction projects.



"I'm really comfortable with Trudi's approach — really proactive. She was interested in what makes sense for my business and has produced a dashboard that's easy to understand! I thought bookkeeping was a bit of a science... once discussing, I realised the service went quite a long way beyond that!"

Brian Whealing

Baja Project Management

THE SOLUTION

From the first meeting, Carbon Group made it clear how the team would partner with Baja Project Management and — more importantly — how its services would save time and support growth.

To streamline Baja Project Management's bookkeeping needs, Carbon Group walked the business through a seamless transition that involved closing off loose ends, setting up an automated billing format and submitting end-of-year results.

Furthermore, Baja Project Management's assigned Account Managers (Vanessa & Nancy) ensured its bookkeeping needs never went ignored, remaining in close contact with the business to quickly answer questions, provide thorough and personalised feedback regarding its financial health, and paying close attention to detail at every step of the way.

"They know when things are urgent — it'll be picked up on e-mail straight away," said Brian Whealing, Project Manager at Baja Project Management.

THE RESULT

Thanks to a seamless transfer process and detailed maintenance by Carbon Group's bookkeeping team, Baja Project Management was able to cut down on its financial requirements significantly and direct more focus towards supplementing the growth of its business. By incorporating various advanced bookkeeping solutions, such as automation, Baja Project Management can enjoy a digestible financial management process through the help of local outsourcing.

Furthermore, Carbon Group partner, Trudi Yip, has formed a close partnership with the company to ensure operations remain as efficient as possible.

"We're really comfortable with her approach... she was interested in what makes sense for my business and has produced a dashboard that's easy to understand!" said Brian.

By upholding standards of proactivity, attention to detail and professionalism, Carbon Group has successfully propelled another business to greater heights and established a valuable relationship beneficial for both parties.



PARTNER WITH CARBON

Our dedicated team can confidently look after all your bookkeeping and finance function needs or just a component of it. Get in touch to find out what we can do for you.

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