



CCH

a Wolters Kluwer business

Case study

CCH ProSystem Suite

Harlands

With 28 staff working from a main office in Consett, Co Durham, Harlands is a forward-looking firm in every sense of the word. They target clients looking for a proactive accountant who can help them achieve their long-term financial goals, both business and personal.

Their managing director, Glyn Davison, and IT & Systems Analyst, Darren Wingfield, talk about the important role that software plays in the firm's success.

“With CCH you can see how everything relates back to the real world and to what accountants need to do their jobs more efficiently”

You use CCH software for all your practice management and compliance activities.

How did that come about?

GD: About four years ago we were running CCH ProCost for practice management with MYOB's Viztopia Accounts Production and Personal Tax from Sage. At that time, only IRIS really combined everything in a single suite, but we felt that the programming platform they used back then was showing its age, so we opted for best of breed from separate suppliers.

Then in April 2008 Wolters Kluwer, who already owned CCH, acquired MYOB and explained how they were going to bring their products together to form an integrated suite. We saw a demonstration of CCH Central and really bought into their vision of the future. CCH had adopted Microsoft.NET for its go-forward products, which was clearly a good platform to build on.

With all these factors combined, it was a straightforward decision to move to the CCH ProSystem Suite for everything.

Happy with that decision?

GD: Definitely. Individually the applications are good – for example, CCH Personal Tax is a lot better than Sage's, and CCH Corporation Tax has coped well with the transition to iXBRL where many developers have struggled.

But the real benefit comes from having an integrated suite running under CCH Central. Take report writing, for example: Darren can set up the reports that people need – maybe, a list of assignments that are coming up over the next couple of months – and then simply drop these onto the home pages. Department heads can then re-run the reports whenever they want, without waiting for technical or admin assistance.

From my own home page I can click on a report to see how each department is performing – the work that’s being done and how we’re getting on with it – I can even drill down to look at a particular client. CCH Central makes real time information directly available to the people who need it, whenever they need it, in a format that’s easy to understand.

As well as moving all your existing software systems to the latest CCH versions, you also implemented CCH Document Management. What was the thinking behind that?

GD: The initial driver was efficiency but we’re also planning for the future. More and more of our clients expect us to be able to deal with softcopy documents and electronic files and we need to be able to respond to that. Of course there are clients who have always used paper and always will, and we have to be able to cater for them, too, but the new generation of business owners and entrepreneurs has grown up with technology – it’s part of their everyday lives. They’ll never rely on paper in the same way that the older generation do; they think digitally – email; mobile communication; digital records, social media... As time passes these people will form a larger and larger proportion of our client base and we have to plan for that. If we can’t compete for their business, someone else will pick it up.

How did you prepare for the move to digital document management?

GD: With new systems, people sometimes blame the software when it’s really nothing to do with the software – it’s the process that’s the issue. I didn’t feel we were ready to go from a pure paper-based system to full document management until we’d been able to refine some of our procedures. We started by investing in new Xerox machines

with scanning capabilities and we used a simple folder-based system on the network for storing the files. This gave staff an opportunity to get familiar with the process of scanning documents and looking at them on screen, so they could get into the habit of thinking in a “less paper” way.

DW: As well as the scanned documents we had softcopy files – like Word documents and Excel spreadsheets – going back several years. In total, there were around 60,000 documents stored on network drives in client folders. Fortunately, we’d arranged these very logically by client, by document type and by year so, although it was a pretty tedious job to bring these into CCH Document Management, it was very straightforward and our support staff could quickly import documents without having to open them.

What about emails?

DW: Before CCH Document Management, emails were being stored in people’s personal inboxes. If someone was out of the office, no one could access their emails which might cause a problem if a client phoned to discuss something they’d sent in or received via email. As more and more clients communicate by email, this problem would have become worse over time.

Staff have now moved client emails from their personal inboxes into CCH Document Management so, together with scanned documents and softcopy files, we now have around 200,000 individual documents in CCH Document Management and there is still some back-scanning to finish off.

How has the project been progressing?

DW: CCH Document Management was installed in July 2010. 1 December 2010 was the cut-off date for adding new paper to the client files. From this date, all incoming post and other documents have been scanned straight into CCH Document Management.

The next major task is to scan around 2,500 working paper files. We’re moving towards the point at which working papers will be reviewed on screen using dual monitors. Once the accounts and tax return have been signed off and submitted, any papers that we’ve used in the process will have been scanned so they can then be sent for confidential shredding.

In your experience, what have been the main benefits of CCH Document Management?

DW: There undoubtedly has been a time saving, but it's difficult to quantify, say per document or per client. In any case, the biggest waste of time with paper documents is not when you can go to a cabinet and pull out the document you want straight away, it's with all the stuff that gets "lost" – that might take hours to find, sometimes days! There were the files that people had taken home or the folders that were sitting on someone's desk or on the back seat of their car or the papers that had simply been misfiled. It's particularly difficult in an office like ours which is spread over three floors!

Less paper also means less storage and we're saving quite a bit of office space by getting rid of filing cabinets.

There's also the question of efficiency. When a client phones now, we've always got their work to hand – no more hunting around for the information. We've even had a few clients phone us up to get copies of a document that they've misplaced, like a bank statement that was included in the working papers file. If we've scanned it, we can find it, and if we can find it, we can email it to them.

GD: That's very important to us – being more efficient, more proactive and presenting ourselves professionally.

How do you see things developing in the future?

GD: We're looking at several other software products from CCH, but I think it's important to use each one thoroughly before moving on to the next, otherwise there's a danger that you don't fully exploit the opportunities.

CCH Auto is an obvious next step on from basic document management. We can take documents, or even scanned files that have been sent by email, automatically extract the information from them and then feed that straight into CCH Personal Tax. CCH Auto is revolutionising the way that people look at the tax return process and that's definitely where we want to be so I'm very keen to work with CCH on further developing the forms recognition engine.

We've also looked at CCH KPI Alerts as part of workflow management. We can set a parameter for something like WIP and get automatic emails when it reaches a particular value, so I'll know when a job has £2K worth of work on it and department heads will be able to monitor the progress of jobs across their team.

So you're happy with CCH as a partner?

GD: Absolutely. From the original demonstration of CCH Central what struck me was the way that CCH is listening to the people who actually use their software and taking their suggestions on board. The whole concept of Central and the way that the applications fit into this, that's what's different. With other software vendors, you often feel that the applications have been developed by software engineers thinking in software engineering terms. With CCH you can see how everything relates back to the real world and to what accountants need to do their jobs more efficiently.

For more information

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