

Professional Integration and Training for CCH iFirm Paves the Way for Cloud Accounting Transformation for Greenview Accounting

Summary

Company profile

Name:	Greenview Accounting Group
Region:	Australia
Operation:	Accounting and Taxation, Business Services and Consulting
Products:	Proactive taxation and business consultants
Employees:	10
Website:	www.greenviewacc.com.au

Challenges

- Successfully implement an accounting platform that would be professionally integrated, with staff training and support available when needed, easy to use, feature-rich and provide value added benefits for the future

Solution

- CCH iFirm Practice Manager
- CCH iFirm Client Accounting
- CCH iFirm Tax
- CCH CGT Reporter
- CCH iKnow
- CCH iQ
- CCH Portal
- CCH Learning

Established almost 20 years ago Greenview Accounting Group (Greenview) has always differentiated itself from the traditional accounting practice. It was early days when it decided to move away from the single annual report and tax bill style engagement to a future that is based on a predictive accounting relationship with its valued clients.

With a more interactive and consultative approach than most practices offer, the theme of 'Team Service' has been in operation for two decades, exposing clients to the entire Greenview team

over two practice locations when required. The result is a body of collaborative knowledge which has seen the firm win a number of business awards for its services – and remain inspired to continue to deliver excellent services and maintain its profile as an award winning firm.

To maintain its differentiation in a world embracing the cloud, mobility and the ability to work from anywhere, the team at Greenview realised its current – and very long term – accounting practice solution no longer met its needs.

Additionally the recent transition from an unsupported practice management solution version to a newer version found the team with a solution that was harder to use and even harder to do business with.

Greenview had assessed the new option for 12 months but had found it to be a highly frustrating process. The final straw for the practice was the lack of support following what it describes as a disastrous implementation. It had been billed a considerable sum for support and it was just non-existent.

Greenview turned to its accounting colleagues it networked with on a regular basis and was immediately recommended CCH iFirm.

“ We heard first hand how the focus on integration, implementation and training by the entire CCH iFirm team had made such a vast difference in moving to the cloud. We booked a meeting, were really impressed by what we saw and didn't waste any time – we ordered the same day! Cloud, mobility and the seamless integration CCH iFirm was the compelling mix we were looking for.

Tracey Amott, founding partner, Greenview Accounting Group

The cloud accounting solution loved by accountants and clients

With the smooth and successful implementation of the core modules for CCH iFirm including practice management, tax and accounting the firm now has the ability to make the most of the cloud for itself and its clients. Following two full days of onsite training, any ongoing queries about the feature-rich professional accounting platform are always dealt with quickly and easily. Telephone calls to the implementation and training team are returned promptly and queries solved jointly online on the day.

With multiple on site visits by the CCH iFirm team representative Greenview understands the wide range of features on offer in Practice Manager, particularly for job-based reports. Now with CCH iFirm the automation of the cloud is benefiting the team and its clients and is forming the basis for exciting future business transformation.

“ CCH iFirm Practice Manager has allowed us to reveal and track where our inefficiencies lie – not just across a client portfolio but on a job-by-job basis. We believe that by improving the allocation of time for specific jobs, particularly in areas such as bookkeeping, we will be able to deliver an 80% efficiency and productivity improvement for the practice.

Jodie Smith, partner, Greenview Accounting Group

With tradespeople and construction related SMEs making up a large section of the client base, they too now have a better understanding of the benefits of the cloud. Many have simply leapt at the chance to head to the cloud and now account queries, quoting, invoicing and reporting for their own customers in the cloud are generating returns for them as well.

“ The power of the cloud and the mobile capabilities for CCH iFirm is also much loved by our clients. Onsite client meetings are letting anyone in our team resolve queries on the spot on their iPads. For some of our clients this is their first exposure to cloud. This live demonstration of the benefits of a truly integrated business in the cloud is a positive influence and it turns out – also quite inspiring.

Tracey Amott, founding partner, Greenview Accounting Group

From an accounting perspective the implementation of the fully integrated suite from Wolters Kluwer is now linking the underlying data and reducing manual data entry tasks. For the firm this now provides the opportunity to focus on how time is spent on a client's account – with a focus to value add.

BAS time is now proving to be an opportunity for the firm to extend its business consulting services to clients, acting more as a trusted advisor than tax accountant alone.

Predictive Accounting will Pave the Way for a More Intelligent Practice

Greenview is part of the Client Advisory Board for CCH iFirm, participating in the early adoption of CCH iQ, the predictive intelligence and accounting tool and excellent touch point for clients.

CCH iQ enables the matching of specific events and outcomes to particular clients and is an automated tool the firm is using to communicate ATO Benchmarks and beyond with specific clients. It can target specific clients for specific topics quickly and easily and working with Wolters Kluwer as an early adopter is creating a system that works 'their way'.

“ Predictive accounting is paramount. It is all about the service and the customer relationship. This is how Greenview is differentiating itself and our clients need to know that we not only on top of key events that are actionable, but are ahead of our competition in being able to communicate this to them and offer the appropriate follow up service.

Jodie Smith, partner, Greenview Accounting Group

Additionally being a firm 'big' on client communication CCH iQ is already being factored in to the future operations for the firm. Greenview is working closely with Wolters Kluwer to refine how the solution identifies the criteria the firm wants to build into a fully automated offering for its client base, and develop a new level of IP for its overall practice.

“ Unless we have access to time to identify what is relevant for our clients we lose touch with them very quickly – compliance can be simply overwhelming. We believe that CCH iQ will be the filter that we need to ensure that we match events and potential impacts to specific clients – automating the compliance regime even further. This will benefit their business and, in turn, our business and I expect to see that this generates new business opportunities for us all.

Tracey Amott, founding partner, Greenview Accounting Group

CCH iFirm is the next-generation cloud-based suite of software allowing accountants to run more efficient and profitable firms. The CCH iFirm suite includes Practice Manager, Tax, Client Accounting, Web Manager, Document Manager, CCH Portal and CCH Learning and now the industry's first predictive intelligence tool for accounting.

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