



Case study

Wolters Kluwer supports Alexander James & Company's long-term success

Alexander James & Company Limited, based in Thames Ditton, has been part of the Surrey business scene since 1991. Chiefly through personal recommendation, the firm of Chartered Certified Accountants has steadily grown its client base across the UK. It supports personal clients and businesses in sectors as diverse as distribution and logistics, the performing arts, manufacturing and construction, among others.

Key benefits for Alexander James & Company



An integrated suite of software that evolves to meet statutory and professional requirements



CCH OneClick aids GDPR compliance, while supporting effective client communications



Proactive account management keeps the firm up to speed on innovations to improve efficiency

Alexander James & Company has used Wolters Kluwer compliance software for its accounts and tax work for nearly thirty years, with CCH Practice Management now managing the team's busy workload.

Over this time, Practice Director Andrew Nicholson has built a collaborative partnership with Wolters Kluwer: "Right from the early years, back in the nineties, I have felt very comfortable with the people behind the software. You're dealing with real people who understand the profession and are interested in what you're doing."

Andrew finds this attitude is prevalent throughout the Wolters Kluwer organisation, including back-office functions such as licensing.

A proactive approach

Andrew singles out his Wolters Kluwer account manager for particular praise, feeling he is genuinely engaged in supporting the firm's goals. He observes, "Joshua keeps us up to speed on new developments, a special offer or a roadshow he thinks we'll find useful - not just with a general email but by calling us personally. We have some really good conversations."

While Andrew is forward-thinking in welcoming innovations that will increase efficiency within the firm, he adopts new technology in a measured way. He appreciates that Wolters Kluwer recognises and respects the difference between an immediate need and a longer term goal.

He comments, "We don't like to run before we can walk. This is where Joshua is an account manager, not a salesman always trying to push us to buy the next new thing. It's a very refreshing approach to doing business and has always been our experience with Wolters Kluwer."

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Andrew likes Joshua's proactive approach to enhancing the firm's usage of the software. When he admitted that he hadn't got to grips with workflow on CCH Practice Management, Joshua encouraged him to ring-fence time for training.

This training has now paid huge dividends in subsequent time-savings, says Andrew: "Whereas we were managing information in spreadsheets, which can be risky, we can now automate our own workflows. This has improved our efficiency and also our regulatory compliance, which places great emphasis on not letting anything slip through the cracks. The system doesn't allow us to move forward until we've performed certain actions."

CCH OneClick - the answer to the data protection challenge

The firm benefits from the Wolters Kluwer team's in-depth knowledge of the profession, gained from working with accountancy firms and practices up and down the country, "They've seen it all before," says Andrew. "If I come to them with a problem, they always offer a solution that can be tailored to the way we work. It's very reassuring and encouraging."

The introduction of the General Data Protection Regulation in 2018 created a major compliance challenge for firms like Alexander James & Company.

Andrew was not alone in being concerned about the size of the task when he assessed the likely impact on client communications: "The more we learnt, the more apprehensive we became. How could we ensure watertight security in client communications? There always seemed to be another obstacle. Fortunately, Wolters Kluwer answered all our questions before we even asked them!"

It transpired that CCH OneClick was the solution in providing a secure web-based portal for exchanging documents with clients and gaining their approval. The firm became an early adopter. Andrew comments, "CCH OneClick came as a pleasant surprise. As well as providing a centralised, easily accessible store of information, it makes our lives easier by enabling secure, effective communication with clients."

CCH OneClick overcomes the reluctance of new clients to use an accountancy portal, perhaps because of a previous poor experience. When Andrew suggests they give CCH OneClick a try, they take to it readily, finding it very simple to use.

He adds, "Having CCH OneClick in place also reassures new clients that we're professional, compliant with the legislation and take data protection seriously. For our part, it's one less daily worry."

The seamless integration of new and existing technologies, such as CCH Personal Tax, saves the firm even more time by streamlining client approvals and filing to HMRC.

Evolving solutions

Of the many changes Andrew has seen during his accountancy career, digitalisation has been the most significant. He can recall the days when the firm's first server had just a single gigabyte of disk space!

"We have relied on Wolters Kluwer to help us adapt over the years. They are always thinking far ahead and plotting the roadmap. We're happy to follow their lead in the drive to continuous improvement. For example, the introduction of a new release of CCH Personal Tax saved around 30% of processing time."

As a Wolters Kluwer customer of many years, it would be easy for Alexander James & Company to feel taken for granted, but this has never been the case, says Andrew, "Throughout our working relationship - and that's over two decades now - we've had regular, routine contact, and if ever we need help or advice, we just pick up the phone."

"Right from the early years, back in the nineties, I have felt very comfortable with the people behind the software. You're dealing with real people who understand the profession and are interested in what you're doing."

Find out how we can help



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