



Case study

Annie Manly & Co Ltd provides professional, paperless service with the help of Wolters Kluwer

Based between Fareham and Gosport, just inland from the Solent, Annie Manly & Co Ltd is an expanding independent firm of accountants, handling accounts and tax matters for private individuals and businesses.

Key benefits for Annie Manly & Co



Powerful software that processes clients' compliance work efficiently



Document management software to enable paperless working



Expert technical support readily available

Having built her career in the profession, Principal Annie Manly decided to set up an independent practice with her partner Michael White in 2017. Together Annie and Michael bring a range of skills; in particular Michael's professional career in computing provides the practice with a very robust computer network, ensuring data security and back-ups are under their direct control. The computer network built by Michael also enables the practice to take full advantage of various software products, the main one supporting the entire practice being CCH Central suite provided by Wolters Kluwer.

Continuous Improvement

Annie Manly & Co has a broad client base that ranges from ambitious start-ups to established companies looking to expand or even wind down their business. To serve these clients, and free up time for advisory work, the practice adopted CCH Accounts Production and tax software from Wolters Kluwer, and subsequently CCH Document Management and CCH Practice Management software. They also take full advantage of the Message Portal system.

Annie and Michael explain why the choice went in favour of Wolters Kluwer software: "In the end, the decision to purchase CCH Central suite was easy. It seemed the obvious choice. Our thinking was that it had been thoroughly tried and tested, as it had been around for many years. Having used the product suite at other offices it was also familiar and we knew it to be reliable."

Annie and Michael are happy with their choice, saying: "Adopting Wolters Kluwer software has proved a wise decision for us and for our clients. The software works very well and is a powerful tool."

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She also values the way the software keeps pace with the changing compliance landscape: “Our experience has been that Wolters Kluwer invests a huge amount of effort into continually updating and improving the software.”

Going paperless

With growth, Annie and Michael decided that paperless working is the right way to go and the firm has been using CCH Document Management for digital document storage and retrieval for the last two years: “As we expand, we plan to operate on a paperless basis - at least as far as it’s possible for any accountant to do!”

Annie and Michael are clear about the contribution the document management software makes to their practice: “It’s become a crucial tool for us in running an efficient office from an administrative perspective. The cost is easily recovered by the saving of time that we’d otherwise spend on maintaining files, documents, emails and other important records.”

This approach has proved a hit with clients. Annie recalls a recent meeting with a prospect, who had noticed that the firm uses CCH Central Suite software: “They were pleased to see from our website that we use the full package. They equated that with professionalism and were tired of their previous paper-bound accountant’s service! They have now signed up with us as clients.”

Help at hand

Running a busy accountancy practice, Annie and Michael have come to value the support they have received over the past two years from the Wolters Kluwer team: “Our experience of the various methods of support available is very good. Usually, if we need help, we just pick up the phone to the Support Desk. The team are always very patient in working through our queries with us.”

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Find out how we can help



www.wolterskluwer.co.uk/software



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