

*Case study*

## CCH Document Management Four Fifty Partnership

The Four Fifty Partnership offers its clients a full range of tax and accounting services including some, such as wealth management and tax mitigation, more usually associated with the top national firms. The firm's distinctive name derives from the four partners and around 50 staff working in their two offices in Somerset. The Four Fifty Partnership has taken an equally novel approach to implementing document management within the practice as Director, Sue Barks, explains.

**“We began to investigate document management because charges for outside storage were rising rapidly and our internal filing system was bursting at the seams.**

We looked at half a dozen systems and initially selected Invu for a small scale trial within my own team of five. Unfortunately, Invu did not live up to expectations. For one thing it ran very slowly. Another problem was that every file was saved with an automatically generated file name which would make it very difficult to migrate to another system in the future if we ever needed to. With this in mind we looked at other options and quickly identified CCH Document Management as our preferred choice.

Again we started with a small scale trial, which proved to be much more successful than with

Invu. We all agreed that the Wolters Kluwer software was far more likely to be accepted by the rest of the firm because of its ease of use. People outside the team started to ask when they'd be able to use the software so, because of the positive reaction, we began rolling it out to the rest of the office much quicker than originally anticipated. That was around 18 months ago.

Staff adapted quickly to the software itself but accountants have been using paper for a long time and that's a hard habit to break so we haven't attempted to go completely paperless.

When post arrives we scan it into CCH Document Management but we don't destroy the paper original. Instead it's circulated around the practice and dealt with just as before. Once it's been finished with, the paper is put away, kept for one month and then shredded. The electronic version still exists within CCH Document Management, so if a client phones up you can easily pull a document up on screen no matter who has the original. That's much more efficient and better for our clients, too, because we don't have to keep them waiting or phone them back.

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Our correspondence files are all electronic but we do keep a paper file for tax and accounts. This is shredded after two years so that people always have the current and previous years - if they want to go back any further they can find the information within CCH Document Management.

We've already saved a lot of space within the office - filing cabinets are now about as third as full as they were - and external storage is also gradually being reduced.

Before CCH Document Management the filing of emails was a bit hit and miss with many people just saving them on their own PCs. When a client phones up now it's easy to find an email, even if it was sent or received by someone else in the practice.

Our approach might not suit everyone, but it works for us. Over time I'm sure we'll eliminate even more paper - because CCH Document Management is so flexible we can take it one step at a time which helps to keep everyone on board. Successful software implementation is as much about people as it is about systems, so this is a vital consideration."

*Sue Barks  
Director*

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