

Case study

CCH KPI Monitoring

Ryecroft Glenton

With offices in Newcastle upon Tyne, Morpeth, Rothbury and Whitley Bay, the sixteen partner firm of Ryecroft Glenton are a large independent chartered accountant in the North East. Partner, Ian Smith explains how the firm's investment in setting up alerts in CCH KPI Monitoring is now bringing substantial benefits.

“We’ve used the CCH KPI Monitoring system for over five years. We’ve put a lot of effort into learning how to get the best out of it and we now have a number of staff who can write alerts. Having invested these resources, we’re definitely seeing a return. In fact it would be difficult to live without the software now.

We have all the usual alerts running from CCH Practice Management, like reminders for the weekly timesheets. If the previous week hasn't been completed then on Day 1 of the following week you get a warning. Another is sent on Day 2, then on Day 3 the staff partner is sent a copy! This alert keeps track of all completed and outstanding timesheets and the days or weeks that have elapsed. The whole process is very tightly managed but it doesn't need any manual intervention - no one has to physically run off reports or chase people up.

We have our own internal system which consolidates information from a number of sources, including CCH Central and CCH Practice Management, drawing data into an Microsoft SQL Server database, and we can run alerts against this as well. For example, we can use the year end date to trigger a sequence of reminders: Have we asked for the books? Have

they been received? If a request to a client has been outstanding for a certain period, the partner will receive an alert via email. For limited companies, the corporation tax and Companies House filing deadlines can also be monitored. Similarly for pension schemes, which have different deadlines.

Because we have this internal system we've been ahead of the curve in using dates like this as a trigger but, as more of the Wolters Kluwer software applications are brought into CCH Central, this kind of alert will become available to everyone.

CCH KPI Monitoring has brought two big benefits to the practice. Firstly, it reminds partners and staff to complete work within deadlines - preparing accounts, getting client sign-off, completing the CT return, filing, etc. Secondly, it does all this completely automatically. You don't need someone sitting in an office, running reports and trawling through the data. This cuts down the overheads and gets around the problem of admin staff being sick or absent - CCH KPI Monitoring carries on monitoring and reminding 24/7.”

Ian Smith
Partner

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Find out how we can help



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