



Case study

CCH Portal

Josolyne & Co

Based in Macclesfield, Cheshire, the three partner firm Josolyne & Co provides its clients with a full range of tax, accounting and audit services. One of its divisions - Josolyne Medical Services Ltd - offers specialist tax and accountancy support to the medical profession. Client Services Managers Shauna Barstow and Penny Hannibal talk about the impact that CCH Portal has had on this dynamic and forward-thinking accountancy practice.

When did you install CCH Portal and why?

We installed CCH Portal in April 2013. One of our main drivers was the limit on file sizes in our email system which made it difficult to exchange backup files of bookkeeping and accounting data with our clients. We needed to find a method which got round these restrictions but which was also secure. CCH Portal fitted the bill perfectly.

Around the same time as that we upgraded to CCH Document Management. The combination of CCH Portal and CCH Document Management brings documents and messages together in one place, giving everyone in the practice a complete, all-round picture of client communication at all times. It's the integration between the programs in the CCH Central suite that makes this possible.

“With CCH Portal and CCH Document Management working together we get a complete picture of our clients at all times, so that everyone knows what’s going on. That has a very positive impact on client service.”

How were you handling client communication before that?

Most emails were being stored by staff in their own private folders making it impossible for anyone to get a complete picture of client interaction. A lot of files were being saved manually in network folders so there were duplicates, missing files and misfiles. Email and document filing was wasting staff time and was very inefficient.

For a long time now, most clients have been sending us emails and attachments, so we know they're comfortable with that. Using a client portal - which is just another form of electronic communication - isn't so very different.

How many of your clients now use your client portal?

When we first advertised the client portal a lot of our clients expressed an interest and we set up around 300 individual contacts from over 200 companies, although the number of regular, active users is quite a bit lower than this.

Although some people now use it all the time and no longer send us ordinary emails, our biggest challenge is to get as many clients as possible to use it regularly. We've found that the best way of doing this is for us to use the portal as much as possible ourselves. We've taken the

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decision that all final accounts will now be uploaded to the portal, rather than being sent by email, and we'll be doing the same with tax returns. Next year will be the first year that we've had all tax returns going out this way so we're looking forward to seeing how that works.

Our goal is to get as many documents as possible approved electronically, rather than by post. CCH Portal already gives us a secure and verifiable audit trail for document approval and a number of enhancements are planned to make this even more flexible.

We've started using it for general mailings too, like our newsletters, budget booklets and that kind of thing and we remind our clients about the portal whenever we speak to them. The more we use it, the more familiar our clients will become with it. Of course it also saves postage and it means that clients can access the documents whenever they want.

How does CCH Portal tie in with your overall online strategy?

We offer a number of online services now, including the Twinfield online accounting system from Wolters Kluwer. It's really useful to be able to collaborate on financial figures online, sharing real-time data via Twinfield rather than having to send files back and forward - it means that everyone is looking at exactly the same information and there's never any confusion about which version of what backup has been loaded.

“CCH Portal makes the entire compliance cycle more efficient and faster, from collecting information from clients, through responding to their queries to getting their approval with just a click of a mouse.”

Inevitably some of our clients are more comfortable than others about using online systems, and technology in general, but the balance is shifting. More and more clients these days expect to be able to do things online; that's how they pay their bills and interact with their bank, and they don't see any reason why their accountant should be any different.

So do you think CCH Portal helps you to attract new clients?

For the clients who want to be able to do as much as possible online, a portal is fast becoming essential although not all of our clients are in that category. Some of them are quite excited when they find that we can offer it - not a lot of our local competitors have a client portal, so having CCH Portal certainly differentiates us.

How do your clients benefit from your portal?

CCH Portal makes the entire compliance cycle more efficient and faster, from collecting information from clients, through responding to their queries to getting their approval with just a click of a mouse.

With CCH Portal and CCH Document Management working together we get a complete picture of our clients at all times, so that everyone knows what's going on. That has a very positive impact on client service.

Find out how we can help



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