



Case study

CCH Portal

Pearson Buchholz

Oxfordshire firm Pearson Buchholz offers a full range of accountancy, audit, tax and consultancy services from its offices five miles west of Oxford city centre. To help them do this the firm uses the full CCH Central suite including the Wolters Kluwer fully integrated client portal, CCH Portal. Ian Woollard, Director of Business Services, one of the firm's five directors, explains the benefits of using CCH Portal.

We've been using CCH Portal since it was first launched which is now about two years ago. We've found a couple of situations where it's been particularly beneficial.

The first is where we need to delay filing documents while we continue to explore options for the client in the current accounting period. Since these decisions might have an impact on the disclosures and transactions contained in the accounts, we can't finalise those accounts until all options have been properly explored. CCH Portal gives us more time to complete this complex process because we no longer have to allow for moving the documents around by post.

The second situation where it really comes into its own is where decision-makers are geographically dispersed. We deal with firms of all sizes, not just owner-managed companies and family-run businesses, so we might have to get approval from directors all over the country and even abroad. Rather than having to track them down as they travel around the world, we can put the documents onto CCH Portal and they can pick them up whenever and wherever it's convenient.

With CCH Portal you can have parallel approval processes, so you're not waiting for a chain of people to agree in a fixed sequence, and you can tell who has and who has not yet signed off, so it's a great way of managing document approval across a large organisation.

When we use the portal there's a clear audit trail for every document, showing us who created it, when it was sent out, who authorised it and when, and it also saves us time and money on printing, admin and postage, increasing our profitability. I think the software is brilliant and I'd prefer us to use CCH Portal as the norm with paper as the exception.

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Unfortunately only our chargeable staff are trained to use the portal at present so the documents sent by non-chargeable staff still have to be by post.

Client choice is obviously of paramount importance to the firm and, although a lot of our longer-established clients are happy to carry on using post for now, an increasing number expect to be able to deal with us online. There's a whole generation of business owners now who have become used to online invoices and bank statements and looking at PDFs on screen and they don't want to clutter up their desks with paper. We definitely need to be able to cater for these clients, especially as their numbers will increase over time.

We also need to be able to respond to any changes in the law - for example, on the confidentiality of information sent by email - so installing CCH Portal now is a good way of future-proofing ourselves against these kinds of developments.

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Find out how we can help



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