



Case study

CCH Portal

TaxAssist Accountants, Oxford

David Lushington is the owner of TaxAssist Accountants, Oxford, part of the UK's largest network of accountants, offering experience and expertise to over 48,000 small businesses nationally. The CCH Portal software was installed in the Oxford office as part of a national deal with TaxAssist.

"I subscribed to CCH Portal as soon as it was available because I saw it as an opportunity to differentiate myself from the competition and show my clients that I take online security seriously. Recent scares have only served to reinforce the importance of this."

I also felt that there was potential to improve the efficiency of the approval process by using the portal. I send all accounts, tax returns etc. via the portal with a request for the documents to be approved through the portal. This allows for speedy submission of documentation to HMRC and Companies House.

I still ensure in spite of this that I have a meeting with the client to obtain feedback from them, look at any additional services we can offer and remind them that we are always looking for referrals.

I have had no resistance from clients to using the portal and I have found it particularly useful when signing up new clients to let them know that this is how we transfer sensitive information to them. I use the portal for sending my engagement letters to clients and have found that it has improved the speed within which I receive the approval of the letters from clients. It has also been useful for obtaining sensitive information from clients such as UTR, NINO and bank details.

I have been very pleased with the benefits of using CCH Portal and have recommended other TaxAssist franchisees to adopt it."

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Find out how we can help



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