Case study

CCH Practice Management & CCH Central

Simmons Gainsford LLP

The Simmons Gainsford Group comprises Simmons Gainsford LLP, chartered accountants and registered auditors, together with five other firms offering corporate and business advisory services, insurance broking and risk management, independent financial advice, procurement and HR solutions. This extended footprint enables the Group to take a holistic approach to their clients' needs and to offer a complete package of service and advice.

"Staff like the way that CCH Central makes information so easy to access and use and they like the way it can be configured for individual needs. Take the 'home pages' for example. We have one standard setup for partners but a different one for other staff. The partner page shows things like top 10 WIP, top 10 debtors and the partner's highest fee earners. It's right there in front of them, instantly available and they can drill-down to get more detail if they need it.

Everyone has access to timesheets directly from their home page and the tax people have extra pages specifically for working on their clients or checking the status of outstanding work. We start everyone off with a standard set of pages but they can customise them if they want to.

Accessing the programs through a common interface like this makes it easier and quicker to find what you're looking for. You can filter out irrelevant information to focus on what you really need to do your job.

Even though it's good to have the latest design and software architecture, the fundamentals have to be right, too. For example, late or inaccurate timesheets will affect debtors days and write offs; if timesheet entry is easy and quick it encourages staff to keep them up to date. With CCH Practice Management, appointments entered in Microsoft Outlook can be turned directly into timesheet entries which means that the information only has to be entered once and staff can carry on using the program that they're already familiar with.

We also like the fact that the software keeps track of historical information so, for example, if you change an address the old one is automatically saved as an archive. We used to have to do this manually and sometimes people would forget,

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so this is a nice feature to have. Little things like this can make a big difference to the way people interact with the system.

From an IT point of view it's so much easier only having to perform a single update for all our Wolters Kluwer programs. We don't need to worry about files being in different folders and we know that we can update all the applications in one hit.

When we had multiple databases it was easy for them to get out of sync; people would set up the same client with different codes in tax and practice management. Now that everything's handled through CCH Central that can't happen any more so we can rely on the information we're using. The next step for us is to use the data mining and reporting facilities in CCH Central to help us market new services to our clients."

Susie Liman
IT Administrator

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Find out how we can help

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