



Case study

## CCH Central Suite Shorthouse & Martin

Shorthouse & Martin is a dynamic, two partner firm based in Basingstoke with a fresh approach to business success for their clients. Unfortunately, after 20 years of using the same supplier, it became apparent that the firm's software could no longer keep pace with its ambitious plans for the future so Shorthouse & Martin abandoned it in favour of the CCH Central suite. Looking back on the first full year of using the Wolters Kluwer software, partner Les Shorthouse assesses how the change has benefited his practice.

"About three years ago we took the decision to research other accounting software, having been with our previous provider for over 20 years.

Over the years, they had taken us for granted: support was non-existent, ongoing development was poor and we never knew where our next price increase was coming from. I remember adding a licence for one extra member of staff and it was ten times what we had been paying before - I thought that was ridiculous and it felt as if they were holding us to ransom.

There was a real lack of client care and contact and the only thing they seemed really interested in was selling me more training on how to use their software.

With all the time that we'd invested in learning the software and creating data, we knew that the change would be a huge upheaval but we hoped it would be worth it.

We considered all the main competitor systems - Sage, Digita and CCH - and at first we couldn't come up with anyone who matched our previous provider until we saw the CCH Central suite from Wolters Kluwer. Nothing else offered us the same joined-up way of working.

It's more than a replacement for our old system - the CCH Central suite offers us so much more than we had before in several important ways.

To start with, I really like its client-centric approach. With our old software, you had to dip in and out of individual applications to build up a picture of a client. With the CCH Central suite it's all on one screen in front of you, which is really useful for me as a partner - it gives me an instant overview of where we are with the client, how work is progressing, whether bills are outstanding, etc.

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Of course, these days clients don't just expect you to do their compliance work, they're also looking for added value from their accountant as their trusted advisor. So to flourish in this ever changing world we have to do things differently. The CCH Central suite helps us to do just that.

For example, the cross-suite reporting tool allows you to test for, filter and combine data from different applications so, for example, you could create a query to find all clients who have fee protection insurance and a turnover of more than £100k who are currently paying you less than £2,000 a year.

The amount of useful information you can extract from the software is almost limitless. With our old system I was always thinking 'Will I be able to get hold of this information?'; with CCH Central, I know I can.

The CCH Central suite is also much easier to use than our previous software. I'm not a tax expert by any means but earlier this year I had a client in my office and I was going through the figures with them and within about 10 minutes I had completed their tax return and filed it online using CCH Personal Tax - it was just so incredibly easy to use.

It's a great tool for managing the business and it helps us save both time and money. By saving time on basic compliance work, staff can focus on value-added services, which is where we need to be these days. A key feature for us is the ability to monitor and report on KPIs. So every Monday morning I get automated emails to tell me who owes money, who hasn't submitted a timesheet etc - you can set the system up to report on any KPI that you want to monitor and manage.

The Wolters Kluwer transition team led us through the conversion process very diligently. The software is very flexible, very adaptable, and their aim all along is to help you get exactly what you want out of it, so you can achieve your goals for your clients and your practice.

Changing software suppliers after such a long time can be a painful process but things are so much better now, so I've no regrets. In fact, I'd say it's the best business decision I have made."

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[cchsoftware@wolterskluwer.co.uk](mailto:cchsoftware@wolterskluwer.co.uk)