

Case study

Move to the CCH Central suite creates a one-stop shop for Lsd Accountants

Over the past eight years, Lsd Accountants senior partners Davinder Matharu and Lesley White have built a thriving accountancy practice from their office on an organic working farm near Redditch. Visiting clients enjoy the rural ambience of the Worcestershire countryside and the opportunity to admire the flock of sheep owned by the practice. The team serves a broad range of sectors, with particular specialisms in the music, entertainment and media industries and in biking.

Key benefits for Lsd Accountants



An integrated suite of accountancy software for both compliance and practice management



A centralised store of information in CCH OneClick, to improve client service and ease collaboration



Excellent technical support during implementation and day-to-day operation

Taking a holistic view

In the past, Lsd Accountants used a variety of software for compliance and practice management. Acquired over time, each was a stand-alone solution that tackled a particular challenge, such as bookkeeping, compliance on tax and accounts, practice management and workflow.

It's a path that many new practices tread, but as Davinder Matharu points out, this fragmented approach drains time and energy out of the practice. "We had a mishmash of packages, none of which talked to one another. I reached the point where I simply couldn't face having to learn yet another software product and called a halt. We needed to step back and carefully consider what software would best support our growing practice."

A major decision

Davinder and Lesley believe it's crucial to get staff on-board with practice change, so when the search for a new software platform included a trip to the Accountex 2018 exhibition, Davinder was accompanied by two members of their six-strong team.

Impressed by what they saw of the CCH Central suite from Wolters Kluwer, they then discussed the prospect of selecting this software with the whole team. "You can't just throw new software at your team," says Davinder. "Everyone has to be on board."

One of the top priorities on choice of vendor was ready access to technical expertise and support. "We're IT aware but not IT savvy," says Davinder. "We want to be able to play to our strengths and focus on our clients - not be distracted by IT issues. It was one of the reasons we rejected a well-known competitor of Wolters Kluwer when we surveyed the market; their support function received comparatively poor ratings in the reviews."

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CCH OneClick was also a decisive factor. This software enables collaboration in the cloud, with clients having their own document centre, giving instant access to important records. "CCH OneClick really sold it to us," comments Davinder.

Dependable support

By the autumn, the implementation was under way. Davinder and Lesley opted for a staged approach, giving themselves 12 months from the date of purchase to have everything up and running, for both compliance and practice management.

Davinder says, "We're very pleased with the software and we know there are still features and functionality waiting to be explored. We're not going to run out of road any time soon!"

Lsd Accountants takes a flexible, family-friendly approach to enabling staff to work from home. The software enables members of the team to work remotely on clients' jobs, so it's no big deal if anyone has to care for an elderly relative or a sick child.

The team has benefited from training from Wolters Kluwer, and Davinder recommends allowing users to do some e-learning first and 'play' with the software to become a little familiar with its workings. This will help them to get the maximum value out of the training session.

Letting go of legacy software

The business strategy at Lsd Accountants is not to pursue growth for its own sake and risk jeopardising close relationships with clients. Davinder says, "We understand our clients so well that we know colour of their living-room wallpaper! Of course, we want to run a successful business, but our main goal is to improve our productivity and profitability - and that's where Wolters Kluwer software comes in, helping the whole team to work more efficiently."

With the compliance software firmly in place, the practice is now embarking on replacing the stand-alone products for practice management and workflow with software from the CCH Central suite.

Davinder is particularly excited about this next stage in the journey, which will bring improved control of tasks such as resource scheduling and monitoring, practice workflow automation and billing. She'll have the big picture on the team's workload and also be able to drill down to the detail, gaining greater oversight of what staff are working on, and analysing the profit on a job. With a recent restructuring of the practice workload, this will help in retaining control.

As with the implementation of the compliance software, Wolters Kluwer will handle the data migration from the software packages previously in use. "They do everything," says Davinder, "including liaising directly with our IT consultants."

Davinder reflects on the progress made so far in implementing a unified, integrated suite of software: "Comprehensive software on this scale takes time to implement and fully deploy. There's a lot to learn and there are bound to be a few teething troubles along the way. We keep the end goal in mind and we're very happy with what we've achieved to date."

Having placed a high value on support when making the critical business decision to bring all the software in the practice under one roof, Davinder has not been disappointed: "Wolters Kluwer support is second to none. Everyone is so helpful and there's no such thing as a stupid question. We can ask anything we like."

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