



Case study

McPhersons Chartered Accountants delivers joined-up client service with the CCH Central Suite

McPhersons Chartered Accountants is a well-established firm on the south coast employing 25 permanent staff and offering business advisory services, as well as traditional accounting, audit and taxation services. The firm has a varied and interesting client base, including a diversified family farming business, a producer of innovative skincare products for chemotherapy patients, and the organisers of a well-established fringe comedy festival. McPhersons has been working with clients such as these for over half a century, and has been supported in its task for over thirty years by Wolters Kluwer software.

Key benefits for McPhersons Chartered Accountants



Integration across the suite of software creates a unified picture of the client



Electronic document management equips the team with instant access to client information



Collaboration with clients and within the team is enhanced by using a cloud-based portal

Streamlining compliance

One reason for the firm's long-term success has been a readiness to systemise the way compliance work is done, making the process as streamlined as possible. Using software for accounts production and tax from Wolters Kluwer has been instrumental in honing efficiency on core tasks.

Director Mark Finch says, "CCH Central is our bible for everything, with all information saved in an easily configurable database."

With a portfolio of approaching 1,500 clients, the software saves time by automatically sifting through all

client records and reporting back on exceptions, highlighting gaps or out-of-date information - whether that's missing details of directors or a tax return. Mark says this makes maintaining the database much more workable.

Client choice

The firm has been paperless for around ten years, having been an early adopter of digital document storage and retrieval. Today there's not a single filing-cabinet to be found in its Hastings and Bexhill-on-Sea offices.

As well as the obvious benefits of reducing paper-related overheads, Mark finds CCH Document Management a great time-saver in responding to client queries: "With everything on screen and no paper files to trawl through, should a client call up to query a previous tax bill, we can find the answer immediately - rather than spending an hour searching through boxes in a dark and dusty basement and having to call them back! In this way, having information readily to hand not only saves our time, it improves client service."

"We've found using an integrated suite of software, combined with paperless working, essential to efficient collaboration internally and with our clients."

While some clients will always prefer to pick up the phone, increasingly the firm is finding that many appreciate being able to 'self-serve' to find the tax and accounts information they need. McPhersons uses CCH OneClick, a cloud-based portal for secure exchange of confidential documents, such as letters of engagement, sets of accounts and tax returns. Clients enjoy having secure, 24/7 access to all their important records on their own document centre.

Mark sees this as part of a wider trend, with the more enterprising clients wanting to know how their business is performing now, not six months ago: "Accountancy today is about providing real-time information and looking to the future of the client's business, not giving a historical view of past performance."

Improved collaboration across the team

Using the CCH OneClick portal not only provides a mechanism for communicating with the client, it also supports efficient collaboration across the firm's different disciplines, such as tax compliance and planning, payroll and client management.

Mark explains, "We need to coordinate everything we do when interacting with our clients. CCH OneClick allows us to collate information from around the team, so we communicate in a way that is perceived as being joined up and professional. Whereas in days gone by a client might have received three communications from us in a week, now we communicate efficiently, sending them a single package."

Above all, Mark values the way that using software from Wolters Kluwer means everyone in the firm has a holistic picture of the client. "We've found using an integrated suite of software, combined with paperless working and communication in the cloud, essential to efficient collaboration, both internally and with our clients."

He concludes, "Making Tax Digital for VAT has already brought accounting and bookkeeping together in one process. Tax is going the same way. I don't know how accountants who are still working with stand-alone software for different processes - and with paper files - make it all work."

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