

Case study

CCH OneClick secures client communications for Old Mill

Old Mill is a dynamic, top 40 practice. The firm has doubled in size over the last 12 years. From offices in Yeovil, Wells, Exeter and Melksham, a team of 250 highly trained and qualified staff looks after 5,000 private and business clients across the West Country.

Key benefits for Old Mill



Highly secure communications support the firm's compliance with data protection regulations



Open integration with Xero online accounting software increases efficiency by minimising data entry



Client data is instantly available to accountants and advisers on the move

Growing pains

Commenting on Old Mill's organic growth since its formation in 2006, Chartered Accountant Stacey Morrison says, "We provide industry specific insight, tax, accountancy and financial planning advice to a wide range of clients ranging from owner managed businesses, agricultural, rural, food and drink businesses as well as personal clients too. Rapid growth needs careful management and conversations and communications with clients are central to our work," says Stacey.

Putting security top of the agenda

Increasingly stringent regulations on data protection, in particular the General Data Protection Regulation (GDPR), make having a secure method of communicating a high priority. Stacey says, "We've always taken client confidentiality very seriously, but in the wake of the GDPR it's become more important than ever."

CCH OneClick from Wolters Kluwer, a set of cloud tools accessed in one place, enables secure communications within the firm at any time and on any device. Stacey outlines the benefits, "With clients being able to access a secure workspace on CCH OneClick, the chance of anything going astray is minimised. From a GDPR perspective, that's extremely useful."

Stacey goes on to note that CCH OneClick links to the client's digital tax account on their Xero online accounting software, "It reduces the risks inherent in transferring client information."

Time-saving integration

Full two-way integration means that any adjustments made on Old Mill's CCH accounting software can be fed back into Xero to ensure the client source documentation is up to date and aligned with the firm's statutory records.

Stacey highlights the efficiencies this brings to the firm. "We save a few minutes on each tax return by not having to rekey information. It doesn't sound much but multiply those few minutes by 5,000 clients and it adds up to a massive saving in man hours over a year."

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The open integration between CCH OneClick and Xero improves accuracy, too. Stacey adds, “With no need for duplicate data entry, it’s a really useful tool for eliminating human error on the tax return.”

Mobile data

In a busy firm, effectively managing client workflow is vital: “Both our team and our clients need to know exactly what point we’ve reached in accounts preparation. Through the workspace on CCH OneClick, clients can view their upcoming tasks and progress on a clear timeline.”

Importantly, members of the Old Mill team can check these details on their mobile phones wherever they are located. Stacey comments, “Our advisers have easy access to data wherever they are – in the office or out and about.”

As Old Mill’s specialist in financial technology, Stacey has been impressed by CCH OneClick’s performance: “All the features come together and work seamlessly, streamlining our compliance work. This frees time and creates scope to expand our advisory services so that we can listen, understand and advise. In short, CCH OneClick offers so much it makes me wonder why anyone would not want to use it?”

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