



Case study

Ormerod Rutter Chartered Accountants - an integrated business built on integrated software

Ormerod Rutter was founded over 35 years ago by Peter Ormerod and Garry Rutter. Since then the firm has expanded from a single office in Droitwich to six locations across Worcestershire and the Midlands, becoming one of the region's leading independent accountancy firms.

Ormerod Rutter has seen steady organic growth, mainly through client referrals, across all areas of accounting from compliance to more specific advisory services. Its aim is to combine big firm capability with a family firm personality.

Key benefits for Ormerod Rutter Chartered Accountants



Live data and accurate reporting help in managing busy workloads in all production centres



Increased levels of automation on compliance release resources to provide advisory services



A solid, reliable platform to help the firm to embrace industry change and meet client need

An innovative, progressive approach to accountancy services

A key priority for the firm has been making sure a reliable technology foundation is in place to support the efficient operation of resources.

IT Director Paul Freeman explains, "As a multi-company, multi-site firm, we have worked hard over the years to standardise our processes and strive to make maximum efficiency gains, with headroom and flexibility. We have been at the forefront in embracing system automation and also place a high premium on having consistent, accurate data as the foundation for results we can trust."

Using integrated software from Wolters Kluwer has been instrumental in controlling the business as it has grown and diversified.

No constraints on business growth

Having previously worked with a different suite of accountancy software for 13 years, Ormerod Rutter moved to CCH Central with the aim of gaining a guaranteed scalable, flexible platform built on the latest technology, along with improved technical support.

Seeking a truly integrated solution that would support business growth, the firm undertook an in-depth review of the accountancy software market before encountering Wolters Kluwer at the annual Accountex exhibition in London.

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Paul was impressed by what he saw: “On looking closely at the product and everything from the individual compliance modules through to the comprehensive practice management system, bespoke reporting and tailored dashboards, we saw a platform that would allow the firm to stretch its legs, with functionality we could exploit to the full.”

Since going live with the CCH Central integrated suite, Ormerod Rutter has seen efficiency gains in important areas such as multi-company integration, data quality, document management, bespoke live reporting, KPIs for users and clients and workflow.

Ormerod Rutter has over 220 members of staff across a range of disciplines, and CCH Central has supported the drive to consistency that is fundamental to controlled business growth. With all offices using the software, the firm has been able to seamlessly push out efficiency gains in management reporting, measuring KPIs and managing workflow to all departments.

Well prepared for change

For Paul, the benefits of switching software provider extend beyond system functionality and even beyond improved technical support. He regards the association with Wolters Kluwer as a valuable connection.

He explains how the relationship has helped shape Ormerod Rutter’s technology strategy: “Working with Wolters Kluwer has provided us with a strong connection to the industry, new initiatives and legislation. Most importantly, in a time of such rapid change, we have a clear roadmap of where the technology is going and the impact it will have from an operational perspective. Being able to plan in detail and with confidence is paramount. Wolters Kluwer supports us in this.”

As the industry continues to evolve, Paul sees a bright future ahead for Ormerod Rutter. The firm is now looking to expand its existing range of specialised advisory services in niche areas of accounting and tax. It is also bringing its clients even closer by offering collaboration through the CCH OneClick secure web-based portal for document exchange and approval.

Reviewing the difference using CCH Central has made, Paul says, “We have data we can trust and a technology platform that supports our team in maximising their proficiency. They can be at their most productive in adding value to our clients and providing a competitively priced service that guarantees compliance - all with the accelerated speed of delivery today’s clients expect. In short, in CCH Central, we have the best technology to complement the professional skills of our staff.”

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Find out how we can help



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