



## Case study

# CCH Central suite delivers cost-effective compliance for Taylor, Viney & Marlow

Taylor, Viney & Marlow is an independent firm of chartered accountants and business advisors based in the picturesque village of Ingatestone, near Chelmsford in Essex. The firm provides a full range of services in audit, accounting and taxation, along with consultancy and assistance with financial development to individuals and to businesses with up to £70 million turnover across the county, in the Greater London area and beyond.

### Key benefits for Taylor, Viney & Marlow



A suite of software that complies with the latest HMRC requirements



Technology that frees resources for added-value client work



Easily accessible advice and technical support

### Managing organic growth

Taylor, Viney & Marlow has experienced steady growth for nearly half a century. The firm needs to do very little in the way of actively promoting its services, as word-of-mouth recommendation by satisfied clients generates a steady stream of new business.

According to Partner Stuart McCallum, the challenge is not finding clients; it's being able to handle the volume of work coming into the firm. "To manage our growth and make it sustainable over the long term, it's essential that we process clients' compliance work as efficiently as possible."

The workload is also set to increase by 10% as the team in Ingatestone takes on work currently carried out at a satellite office in Leigh-on-Sea, south Essex.

### An optimum balance of resources and workload

The firm relies on the CCH Central suite of compliance software from Wolters Kluwer, which has been in place for over a decade. Stuart explains, "We need to work in a streamlined way so that we can offer clients a service that's affordable for them and profitable for us."

He regards the CCH Central suite as the engine of the firm's compliance work. Nearly thirty members of staff use the full suite of software for personal tax, accounts production and corporation tax, with CCH Accounts Production coming in for particularly heavy usage.

Stuart notes, "In common with firms across the industry, we find it difficult to recruit staff with a few years' experience under their belts. So we use the CCH Central suite to release resources that are at a premium for higher value work."

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The Taylor, Viney & Marlow team has the comfort of being able to call on the Wolters Kluwer support helpdesk. Stuart says, "It's nice to know that they're always there should we need them, even if it's just for reassurance that we're doing things the right way. They are very easy to contact, too - there's never a long wait."

Over the years, the firm has expanded its use of Wolters Kluwer software, adopting CCH Practice Management, which supports partners in running a profitable business by logging time and ensuring all chargeable work is billed for. Stuart comments, "We're aware that we haven't tapped the full potential of all our software. However, it's good to know that we're not likely to run out of road any time soon!"

### Preparing clients for Making Tax Digital

Making Tax Digital is the latest in a long line of compliance challenges that Wolters Kluwer has helped the firm to manage. The firm has added CCH OneClick, a set of cloud tools accessed in one place that enables secure communications within the practice and with clients at any time and on any device.

Looking ahead, Stuart says, "With Making Tax Digital finally kicking in, we want to be ready to jump on it and are busy preparing our clients. As a portal for making submissions on clients' behalf, CCH OneClick is central to our plans."

As the compliance landscape constantly changes, Stuart knows that he can rely on Wolters Kluwer to keep its software aligned with HMRC requirements. Meanwhile the firm's Wolters Kluwer account manager keeps in regular contact and takes a consultative approach to the firm's requirements, "We catch up every month," says Stuart. "There's no hard sell. He's there to advise us on the best way forward for our business in using Wolters Kluwer software."

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#### Find out how we can help



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