

Innovative Accounting Firm Introduces *CCH Portal* to Better Serve its Clients.

Since 2002, Calgary-based Misura Professional Corporation (MPC) has been offering accounting, consulting and auditing services to individuals and small to medium-sized companies in Alberta and B.C. A firm of 7 employees led by President Nicole Misura-Leitch CGA, MPC has always been on the cusp of innovation, aggressively searching for new ways to improve its already high level of customer service. Over the years, this focus had led the firm to implement a wide range of leading edge CCH software, such as *Personal Taxprep*, *Corporate Taxprep*, *FormulaTrix* and *CCH Profit Driver*.

In the fall of 2009, MPC made another forward-thinking move. It became the first organization in Canada to start deploying *CCH Portal*, a Web-based application that allows accounting firms to exchange client documents of any size, confidentially and securely.

“I heard about *CCH Portal* while I was attending a *CCH Profit Driver* seminar,” says Misura-Leitch, “And I knew I just had to have it.”

CCH Portal has allowed MPC to be more efficient and to provide faster turnaround times for clients. Now clients have secure, 128-bit encryption, around-the-clock Web access to their files and documents. They can access important financial information when they need it, wherever they are, with no time delays. For instance, for a meeting with a mortgage broker, banker or auto dealership.

“The biggest challenge I have, especially during tax time, is being able to get my clients what they need as quickly as they want it,” comments Misura-Leitch. “*CCH Portal* lets them find the information they need in minutes.”

What’s more, thanks to *CCH Portal*’s built-in *Taxprep* integration, MPC’s employees are able to publish PDF files to any client’s portal in just a few clicks.



Nicole Misura-Leitch CGA, President of MPC

MPC has seen other benefits as a result of their implementation of *CCH Portal*. There has been a dramatic reduction in the time spent reproducing, collating and mailing client paper documents. Related to this, *CCH Portal* has made it even easier for the firm to go paperless. That’s because instead of printing out tax returns for clients, the firm’s employees can review the returns with them online.

Also noteworthy is the fact that *CCH Portal* has made it incredibly easy to share large files without paralyzing MPC’s server, or the servers of any of its clients. Now when someone needs to send something big, they are simply advised to send it via the portal - no matter how sensitive and confidential the information might be.

Not only did *CCH Portal* improve MPC’s level of customer service, it freed up its employees to spend more time on revenue-generating work such as consulting, rather than on more administrative tasks such as photocopying and searching for documents.

On the subject of cost, *CCH Portal* comes with a reasonable price tag, especially when compared to the alternatives. “When I was talking to Web development companies a few years ago, I considered including a client access area on our Web site that did roughly the same job as *CCH Portal*, with a lower level of security,” recalls Misura-Leitch. “I was told that it was going to cost me up to 50 times more than what I ended up paying for *CCH Portal*.”

CCH Portal was easily and quickly configured by a member of the MPC’s staff – and now everyone at the firm is using it. And on those few occasions when CCH Technical Support was required, Misura-Leitch said it was “nothing short of amazing.”

Currently, close to 60% of the firm’s clients have embraced *CCH Portal* with open arms. In upcoming years, Misura-Leitch anticipates that this number will increase dramatically as more and more clients try it out and realize its benefits.

“*CCH Portal* gives our firm a clear competitive advantage,” says Misura-Leitch. “Many of our current clients have said they feel as though they are working with an accountant that is on the edge of technology and keeping up to date. And in new business presentations, *CCH Portal* has given us a whole new innovation to sell.”



Home page of a firm-branded portal

And what other ways will MPC be using *CCH Portal* in the near future?

For one thing, it intends to make more forms available to clients for downloading. In addition, as the firm continues to expand, *CCH Portal* will be used to provide potential branch offices with the ability to share information.

“I realize that I took a leap of faith ordering *CCH Portal* before anyone else had it in Canada,” remarks Misura-Leitch. “And based on the results, I’m glad I did.”

If you are interested in purchasing *CCH Portal* or need more information, call 1-800-268-4522 and speak to a member of the CCH Customer Service team or visit cch.ca/portal.

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