

# McCabe Ford Williams

*McCabe Ford Williams are Kent-based tax advisors, licensed insolvency practitioners and chartered accountants*

## *McCabe Ford Williams saves time and space with IRIS OpenDocs*

Established for over seventy years, they have a client base of small to medium enterprises and family businesses throughout London and the South East.

There are six McCabe Ford Williams offices: in Ashford, Cranbrook, Dover, Herne Bay, Maidstone and Sittingbourne, with associated offices on the continent.

### **Closer collaboration**

From the Sittingbourne office, Partner Liam McHugh explains how McCabe Ford Williams came to implement IRIS OpenDocs integrated document management.

"We were merging our IRIS databases in Sittingbourne and Maidstone and looking for ways to facilitate closer collaboration between staff in the two offices. As long-term users of IRIS Accountancy Suite, it made sense to look at what IRIS could offer. We decided that IRIS OpenDocs fitted our requirements, as a document management solution that would integrate with our IRIS software."

The implementation went forward in January 2011. While Liam himself is a great advocate of using technology to improve efficiency and client service, he wondered how IRIS OpenDocs would be received by the fifty users in the two offices. As it turns out, he was pleasantly surprised: "The change went smoothly and our users have taken to it very well."

Expert training from IRIS helped staff to gain familiarity with the solution and embark on the transition with confidence. Liam adds, "We haven't had to call the IRIS support team but we know they're there if we need them."

### **Supporting responsive client service**

Liam highlights how IRIS OpenDocs supports the firm in delivering responsive, professional client service: "If a client calls, we can quickly open up a document, rather than hunting for the right piece of paper. It's much more efficient.

Furthermore, when we visit a client, all the relevant 'paperwork' required for a productive meeting is to hand."

He points out, "In the past, if someone removed a file from the office, the data went with them. Now everyone has shared access to the data, whether they're in Sittingbourne, Maidstone or with a client." McCabe Ford Williams clients increasingly use electronic methods of communication, so as Liam says, "In adopting IRIS OpenDocs, we're working in a way that complements our clients' preferences."

Improved tracking of communications McCabe Ford Williams uses IRIS Practice Management and there is seamless two-way integration with IRIS OpenDocs: letters, accounts and correspondence created in IRIS Accountancy Suite are saved to IRIS OpenDocs.

Liam confirms, "When we write to clients, any correspondence created through IRIS is filed automatically - it just happens." Any paper correspondence coming into the office is scanned and stored on the system.

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Liam says that the biggest impact of implementing IRIS OpenDocs has been the improvement in email retention, as these are automatically saved in IRIS OpenDocs along with all their attachments: "Retaining all email communication with clients used to be difficult before we had IRIS OpenDocs. Now, it's so easy to save emails that it encourages staff to apply consistently good practice. It's also become much easier to track all correspondence with a client and quickly resolve any client queries. Everyone has a shared understanding of the relationship and there is less chance of something being overlooked."

#### **Continuing the drive to less paper**

A few months on from the original implementation, Liam says, "We've moved forward very quickly. I don't think we'll ever achieve a completely paperless practice; nor would we want to."

There will always be a place for paper, such as in keeping signed contracts, but we're continually driving down our consumption and storage of paper month by month. Space is expensive in this area, so with IRIS OpenDocs reducing our need for storage, we're also lowering our overheads."

Liam sums up the impact of going (almost) paperless, "With IRIS OpenDocs, we save valuable space and time, achieve greater consistency when storing information and gain easier access to client information. It all adds up to increased efficiency and reduced overheads, while supporting us in providing excellent service to our clients. IRIS is constantly enhancing the product and we benefit from new developments coming through."

#### **Solution summary**

- Automatic filing of emails and documents saves time
- Correspondence consistently stored
- Supports greater collaboration by centralising all correspondence and work associated with a client
- Office space released as the need for storage is reduced
- Fast retrieval of client information in the office and in client meetings

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