



Digital trailblazer CGA supercharges practice efficiency with paperless office

CUSTOMER PROFILE

CGA is based just outside York in Escrick, and is led by Director Chelle Thirsk. Its team of eight highly qualified professionals includes members of the Association of Chartered Certified Accountants, Institute of Chartered Accountants in England and Wales, Association of Accounting Technicians, and Association of Taxation Technicians. The firm has a broad range of clients of varying sizes, with turnovers of up to £12m.

BUSINESS CHALLENGE

Committing fully to a paperless office and finding a way to do so that made key documents easy to find and enabled staff to be both efficient and effective.

SOLUTIONS USED

IRIS Docs
IRIS Accountancy Suite
Practice Management
Accounts Production
Personal Tax
Business Tax
Company Formations
Company Secretarial

New digital technologies offer great potential for accountancy practices, enabling them to work far more quickly and efficiently, and enabling them and able to serve clients more easily. CGA in York is a trailblazer in making the paperless office a reality and in doing so has vastly improved the speed and simplicity with which its team carries out their daily activities.

When CGA took the bold decision to go paperless, it lacked a centralised system capable of taking full advantage of the benefits this new way of working opened up for them.

After a thorough review of the market to find a system that would meet its present and future needs, the firm opted to adopt IRIS Docs, a comprehensive document management system that streamlines the way practices work. CGA implemented IRIS Docs (previously Invu) in 2008.

Claire Barnard FCCA FMAAT ATT, CGA's Manager, explains: "We'd gone down the paperless route a few years before but found we needed a system that enabled us to search for and find our documents easily and quickly, one that gave us greater protection and stopped us from deleting things accidentally. That's what IRIS Docs has done for us and it's been an essential part of the system ever since."

The benefits have been visible for both staff and clients alike, she says: "It's a nice, easy and quick package to use and everything is quite regimented. If you have an accounts document, it gets saved in the accounts section and it's easy to find."

"It's not a problem if clients call wanting something but their normal point of contact is out of the office because IRIS Docs creates a centralised place where everyone can find the documents they need. If a client calls wanting a copy of their tax return; any of our team can find and access that. This gives us efficiency and the result is a very happy customer."

Some of the most apparent benefits, says Claire, are the ease of search facilities, including the ability to go through keywords in the content. Overall, IRIS Docs has helped them to achieve substantial savings – both in money and in time.

Before the arrival of IRIS Docs, the firm operated using just a Windows structure on its server with lots of files within files.

"It just wasn't sophisticated enough for paperless," Claire explains, "We wanted a paperless system due to efficiency, we knew that's where the industry was going, and we were at the forefront."



Return on investment

IRIS Docs wasn't in place at the start of CGA's paperless journey, but Claire says it's clear how beneficial it would have been at the starting point.

"If we'd had IRIS Docs from day one of going paperless, we would clearly have had a massive return on investment," she reflects.

"By the time we discovered it and had it in place, we'd already spent a lot of time getting to where we were with the paperless goal. Having gone so far down the road with it, it was hard to justify spending the money but we needed it to have extra protection in place.

"We liked the product and we believe we have had significant return on our investment because of how quickly it puts everything at our finger tips, speeds things up and makes everything so much more efficient."

"Firms looking to go paperless can reap the benefits financially", she says.

"For any new firms out there looking to go the route we have but who have not started yet, there's a huge amount of investment of time and IRIS Docs would definitely work for them and give them a big return on their investment."

Making GDPR much easier

One of the heaviest compliance burdens of recent times - GDPR - has been lightened significantly thanks to the centralised system that IRIS Docs provides.

"It's definitely been easier to comply with GDPR, we haven't had to worry, thanks to IRIS Docs," Claire reveals.

"Without it we'd have had documents all over the server and not centralised. That certainly would have been more difficult."

Compliance is greatly supported through the comprehensive audit trail that is always available.

IRIS Docs enables CGA to carry out simple searches that allow staff to see and retrieve every document related to a particular client, client, at the touch of a button, if and when they need to. It also facilitates searches between specific time periods.

"So if there's information I need to delete, I can do that quite easily," Claire explains, with data protection compliance in mind.

She adds: *"Our security is also tighter as we've got protection on the server, with passwords, and within our network. It's a secure system."*

Getting staff on board

With a change culture at CGA, everyone adapts easily and quickly, and this was particularly so with IRIS Docs, especially as the benefits were so obvious so quickly.

"Staff don't want to have to deal with something that's onerous, but IRIS Docs is the opposite," Claire declares.

IRIS Docs also means the practice is greener and uses less storage space, cutting out the need for filing cabinets and printing.

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Integration means time saved

With IRIS Docs, there's a seamless flow of documents thanks to full integration with IRIS Practice Management and Accountancy Suite.

Claire confirms: *"It definitely saves a lot of time because all of the programs are linked to each other, rather than manually having to input figures, there's a lot less room for error and makes us more efficient."*

"So when we generate tax returns within IRIS Personal Tax, it logs the report - we don't have to save it manually. It's an automated process, linked to our exchange server. Client emails are also automatically saved into IRIS Docs. We don't lose any email trails, it all just happens on its own."

Practice Management is a key part of the practice. Explaining why, Claire says: *"We never miss a deadline because everything is so automated and every deadline has a date attached to it."*

She adds: *"It gives us regular workflow reports so, as a practice, we are much more efficient."*

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