

# Thriving practice revels in time and money savings



IRIS. Look forward



## Customer Profile

Bells Accountants has three offices, based in Chislehurst, Bexley, and Kenley. The practice has grown substantially since it was created by MD Joanne Bell ten years ago, with a wide range of SME clients, including plumbers, antique dealers, electricians, dance school, driving instructors, media companies, solicitors.

## Overview

Founder Joanne Bell set out to run a reliable and efficient accountancy practice that was also friendly and approachable. Increasingly important for her, as the business grew, was minimising administrative burden to enable her to spend more productive time with clients, and staying on top of changing legislation.

## Solutions used

- > Accounts Production
- > Company Formations
- > Personal Tax
- > Business Tax
- > P11d
- > Practice Management
- > AutoMail
- > OpenSpace
- > KashFlow

## Challenge



*"It is such a great 'one size fits all' piece of accountancy software and we won't be changing it anytime soon."* Joanne Bell, MD, Bells Accountants

Ten years ago, Joanne Bell was just starting out solo with her fledgling accountancy practice. Now, she has a thriving business with three offices, over 1,000 clients and 26 staff.

Her aim at the outset, she says, was "to run a reliable and efficient accountancy practice that was also friendly and approachable". And when the business began to grow, she needed software she knew would be able to cope with the quickly evolving demands.

So, in 2013 she turned to IRIS, which she had used in a previous job. Since that point, she says it has "radically improved my day to day productivity, with the benefits reaped by my team.

*"I knew having the right tools in place would minimise my activity and allow me to increase the amount of time I spend being productive with my clients and IRIS has without a doubt, played an integral role in this.*

*"It is such a great 'one size fits all' piece of accountancy software and we won't be changing it anytime soon."*



## Approach

### Time and money saver

Part of this increased productivity has meant significantly reduced costs as well.

Helen Attack, the Chislehurst office Practice Manager, who has been with Bells for nearly six years, says: *"It definitely saves time and money and has enabled us to be more efficient – much more so than the old-fashioned methods. It avoids unnecessary time spent in many areas; for example, the way IRIS Accounts Production filters through to IRIS Business Tax; and also the reporting facility works particularly well."*

### So, just how important has IRIS' software been to the thriving practice?

Helen has no doubts, responding: *"Immensely – we couldn't do without it – it's part of everyday life. I think a fair description to say it's like an additional member of the team."*

She says without IRIS the company would unquestionably need another member of administrative staff, saying that particular burden would be much higher.

### Easy, automatic tracking for clients

Joanne highlights another aspect of the increased efficiency that Bells enjoys: *"My team loves the fact IRIS links up to our email system and automatically saves a copy of our email exchanges with customers."*

*"It means we have an audit trail of everything we've spoken about with our customers to date, which is invaluable for quick reference and for checking details."*

*"When we enter a new client into the database, it feeds the information down to all the relevant sections and automatically populates for us. This not only saves us precious time but also helps remove the risk of human error."*



## Solutions

### Multiple sites, one simple system

Helen explained that IRIS Practice Management makes operating a multi-office business far simpler. Joanne added that it had been vital in expanding the business from one site to multiple-sites over the last few years, saying it was *“a much easier process”* thanks to IRIS.

*“We enter everything into IRIS Practice Management,” she says, “So, if we need to work cross-site we can.”*

***“Similarly, all the details are in IRIS Accounts Production and everyone can access it. IRIS systemises everything. It has really helped to work on just one system and has enabled us to produce accounts and tax returns in the same format.”***

Explaining more about how IRIS enables her various branches to work seamlessly together, Joanne says: *“I use IRIS across all of our businesses which, as a business owner is invaluable. It allows me to run reports and see how the business is performing as a whole or I can filter down and run reports by practice.”*

Helen says the way job stages are displayed and reported mean *“you can see at the touch of button what deadlines are coming up.”*

She says the integration between the various IRIS modules makes life a lot easier.



## Results

### When legislation changes, it's no headache

Joanne identifies compliance as another key factor in why she's such a fan of IRIS.

*"The reporting aspect to the software and the fact that it stays abreast of all the regulatory changes is what benefits me and my team the most," she says.*

*"In the early days, I briefly considered having a bespoke piece of software created so I could tailor it to our every detailed need. But due to ever changing HMRC regulations, I knew it would be almost impossible to keep on top of updating the system to accommodate.*

*"The beauty of a software solution like IRIS is that the system automatically updates, so it falls in line with any regulation changes and we don't have to worry about it."*