

**IRIS** | Accountancy

# Flexible software for the modern accountant

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ECCOUNTING

Customer Story



# always keeping the accountant in mind

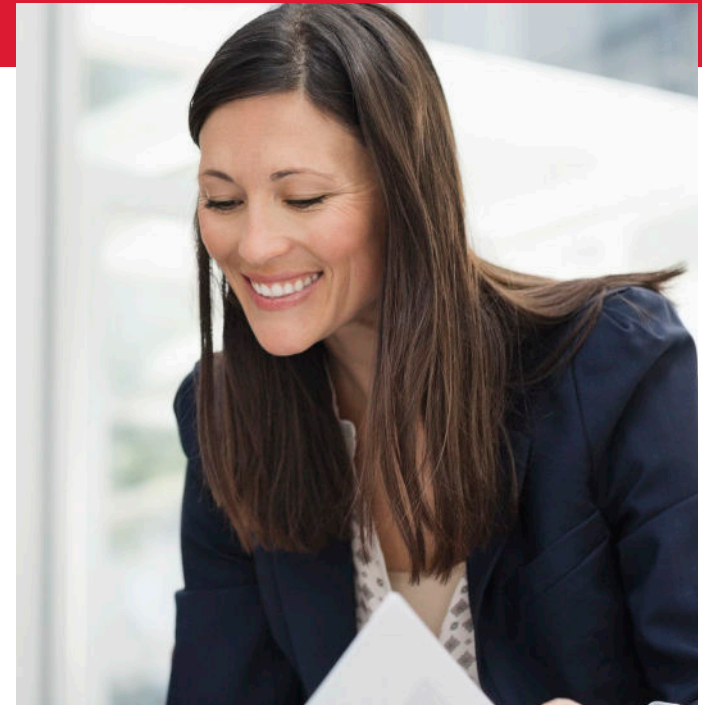
**IRIS Elements** has been on a real journey to become the product it is today, with one specific challenge to overcome: helping users get to the cloud. With work starting before the pandemic, it's certainly been a ride with highs and lows, but after years of hard work and **always keeping the accountant in mind**, the product available today is really changing the game.

**Rebecca Williams** started her practice less than two years ago and spent many years prior using various off-the-shelf and bespoke software solutions across different industries throughout her accountancy career. This gave Rebecca a great base to begin her research into the software products that she later incorporated into her own business.



## What makes you different?

In a competitive market, many modern accountants are thinking long-term about scaling up and what they can offer their clients. For Rebecca, having a digital-first mindset meant choosing software that was flexible and that would allow her to scale her practice quickly, was key.



*She tells us, "I knew that in order to provide my clients with a range of services, I would need to have a dedicated team behind the practice, so in order to scale the practice while maintaining and building new customer relations, I had to ensure that the software I chose was accommodating for when I was able to bring on new staff and subcontractors. It was also incredibly important to me to have a paperless practice, where both future staff members and I were able to work remotely."*





*"I am a great believer in flexibility and wanted to be able to offer this to my future staff members. It also means that we don't need to worry about paper trails, can expand our service location, and we're saving costs as a result. The days of being chained to an office surrounded by paper are long gone."*

*I also often hear people say they see their accountant once a year, but it was important to me to be able to have a great relationship with my clients, where they can reach me quickly. As a result, I need software that is client-focused so that communication is easy and regular. No static annual visits to an office, instead communication and flexibility are at the forefront of the practice. This means that we can maintain a faster turnaround for our clients and provide them with the answers to their queries a lot quicker than previously."*

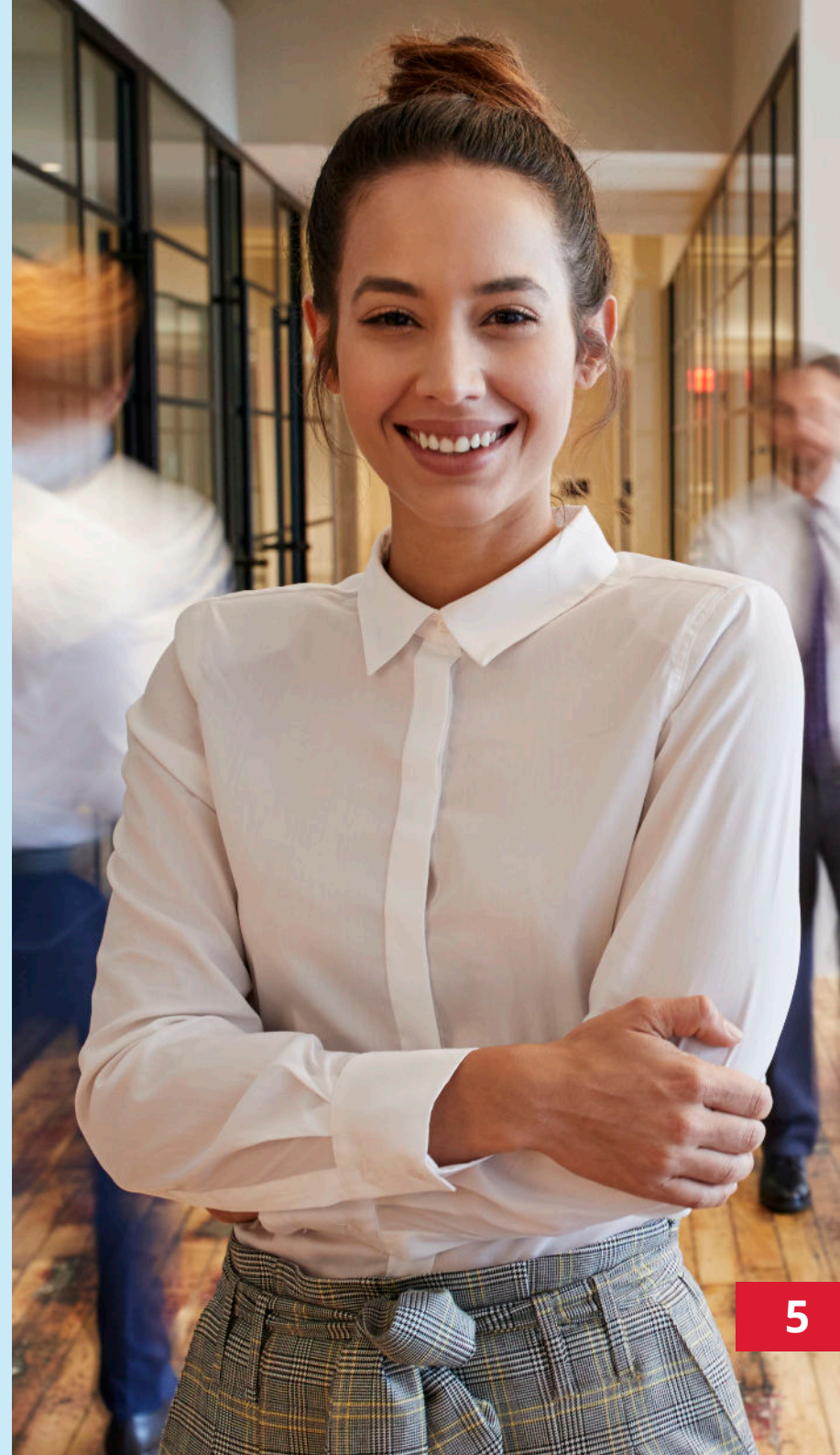


## Finding your software soulmate

Whether you're starting out new or if you've decided to change your software, it can be a very daunting task, particularly with so many options available. We asked Rebecca what she considered and how she found her software soulmate!

*"Having worked with many different software providers, what I do know is it's not something you can implement or change overnight. It's really overwhelming no matter how experienced you are as an accountant, and I took a year to do my research and make sure I knew exactly what I wanted, and exactly what my options were.*

*One thing I think is important to consider is the team behind the product. Having a relationship with your software provider is critical in my opinion, knowing the people behind the software, and making sure they're on your side. I don't want to just be a number; I want to see you at events and stop for a chat. That human element is important to me."*





## One provider - multiple solutions

*"I think the thing you must keep inside your mind when looking at software is, does this software help me provide the services I'm offering? Don't get swept away by bells and whistles - if anything, you want to keep it simple. The type of questions I would be asking myself is:*

- How easy will it be for me to train people at varying levels on this software?
- Can I add modules later?
- Will this help simplify my processes?

These are all questions to ask yourself before and during the process of choosing your software."

Another thing to consider is how much one provider can support you. Rebecca tells us, *"I didn't want to have different pieces of software for different services from different providers. It wasn't going to work - with that, you have additional costs, training time, and multiple relationships to manage."*



*"I can't stress enough that when you're a small practice owner you have no time. So, let's not forget, integration is key. You want to make sure you're being time efficient. When I start hiring employees, I want them to be able to see what was done in previous years, I need it to be easy for them to pick up and run with, and I also need to be able to review what they've done."*

Top 5 most important things to consider when buying software:

- Transparency
- Ease of use
- Client focus
- The team behind the software
- Time savings



# How much time can really be saved with software?

As mentioned above by Rebecca, as a start-up, time is one thing you will always need more of, and that's where technology should help, and not hinder. Realistically, how much time can good software save you?

*"I'm saving a week each month currently, and I expect that to increase when I take on further employees and subcontractors," Rebecca tells us. "I'm saving at least 30 minutes per subcontractor being introduced to IRIS Elements. I've been able to streamline my processes indefinitely because of the way that Elements is set up,*

*it's clear as to what has been included in the self-assessment returns and any supplementary pages needed can be added quickly. It helps to have all the trial balance, accounts, self-assessment, or corporation tax in one place for new staff members and subcontractors, and myself as that in itself saves time."*



# Software created for accountants

New systems can often be a huge learning curve and an additional overhead for time spent training staff or subcontractors to use the platform, but IRIS Elements has been created to ensure this process runs as smoothly as possible.



*“As the system is set up in a left-to-right operation to create the returns required, it’s easy to follow the steps to create the documentation that we need, so you’re not spending time clicking between different pages and in and out of various places across the platform. The information is easy to access and because the system prompts for missing information for the returns (corporation tax and self-assessment) this can save time spent on error checking and validation towards the close of the process and submission to HMRC. It’s difficult to put a time stamp on that time saved but I have in the past witnessed issues with iXBRL tagging and submission to HMRC which can be anywhere from 5 minutes to one hour per submission additional time spent.”*



Karen Williams, Interim Managing Director of Accountancy at IRIS tells us,

*“Elements had to be a natively built cloud platform that enabled firms to transition at their own pace while integrating with other solutions, and we’re really proud of the solution that we’re offering accountants today. We didn’t want our customers to feel trapped inside a walled-off ecosystem of cloud products. Ultimately, we wanted to create a product that people would love, and I truly believe we’ve done that. Hearing feedback like this from Rebecca is just so heartwarming for the team here and we’re incredibly proud of what we’ve done - and what we’ve got planned for the future!”*



One Platform, One Experience,  
One Shared Client Record

Is IRIS Elements right for you?  
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[www.iris.co.uk/products/iris-elements](http://www.iris.co.uk/products/iris-elements)

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