


Accounting firm enhances capacity with IRIS Outsourcing



Customer Story

A man with a beard and glasses, wearing a blue button-down shirt, is sitting at a desk. He is holding a black pen and writing on a document. His left hand is resting on the desk near some papers. The background is a bright window with a view of greenery outside. The image is partially covered by a blue diagonal overlay on the left side.

A West Midlands-based accounting firm, which has requested to remain anonymous, specialises in supporting small and medium-sized businesses, as well as start-ups, with expert accounting, bookkeeping, taxation, and business planning services. To increase operational capacity and manage peak workloads, the company partners with IRIS Outsourcing.

Highlights

- The firm grew 20% year on year with support from IRIS Outsourcing
- Regular feedback and unified processes improve consistency across tasks
- From 10 to 150 outsourced hours



Expanding capacity with IRIS Outsourcing

When the company began to feel the strain of growing workloads, they knew a change was needed. ***“We decided last year that outsourcing would be an avenue to go down, with regards to increasing the capacity,”*** explains the manager. With a team of around 20 staff, and only 6 in the Accounts department, the pressure was mounting – especially as one senior team member was approaching retirement and existing junior staff weren’t yet ready to step up. The situation became even more complex after acquiring another practice in April. ***“With all of that going on, there wasn’t the time to go over a trainee program, which we usually do, or a high recruitment drive because both of those didn’t quite fit,”*** they shared.

To bridge the gap, the company turned to IRIS Outsourcing. ***“It gave us the most synergy. We did look at other providers and we’d spoken to a few, but it never really felt as safe and secure as IRIS.”***

“We trialled IRIS Outsourcing – I think we started with 10 or 15 hours, then moved to 25, 25 to 50, and 50 soon became 150 over the busy period. It was during tax return season – it was a bit of a lifeline for us.”



A woman with curly hair, wearing a dark blazer over a white top, is smiling and looking towards a man. The man is partially visible on the right side of the frame, wearing a light blue shirt. They appear to be in a modern office environment with large windows and indoor plants in the background. A large red diagonal shape is overlaid on the left side of the image, containing text.

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They also leveraged the extra capacity to support internal goals.

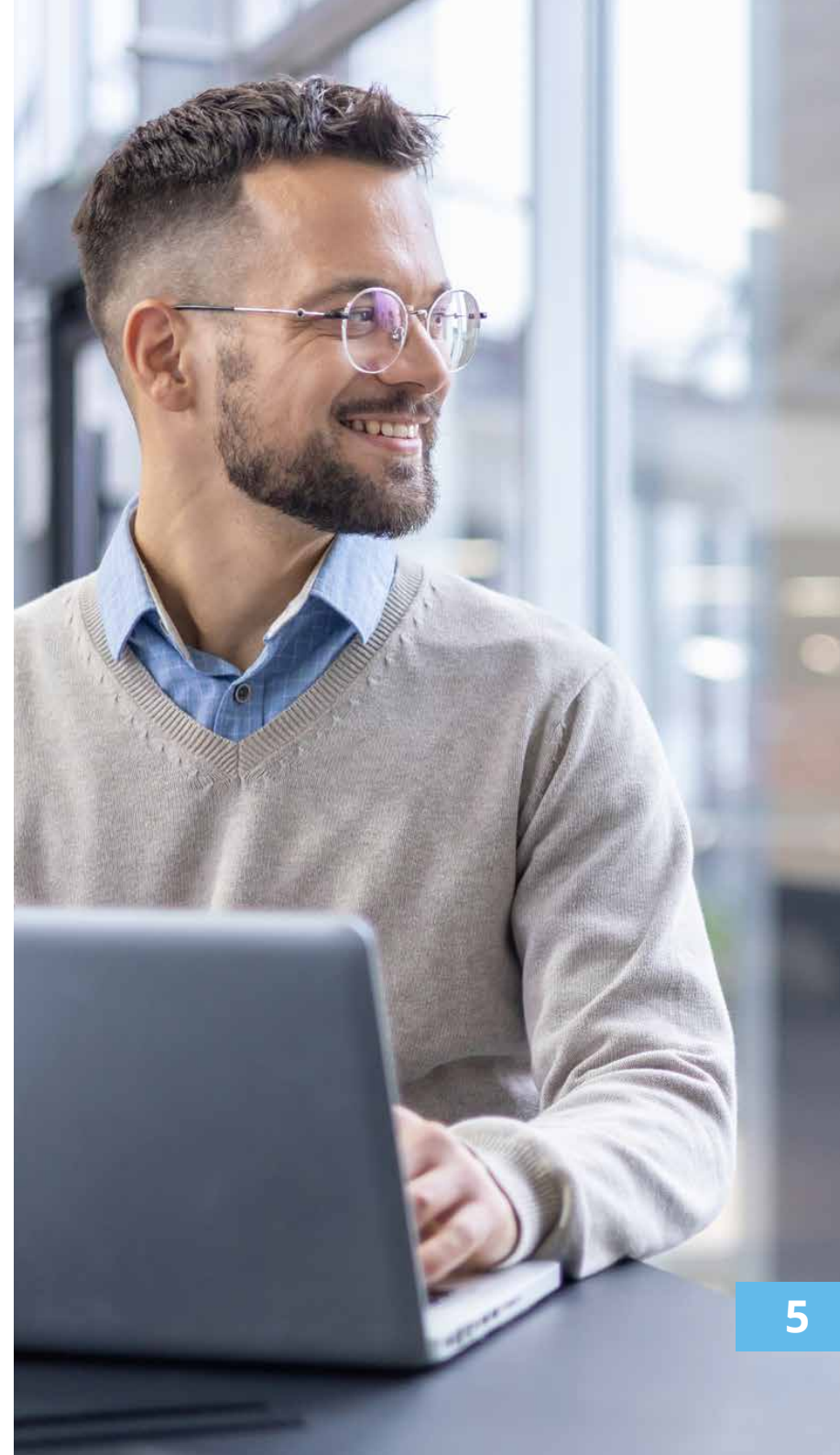
“There was a lot of immediate work needed to bring those year-end accounts up to date. We wanted to support the new team, and since we were in a good place with our workload, we used the Outsourcing resource to take care of our internal tasks,” says the manager. Today, the team continues to use Outsourcing where it makes the most impact. ***“We still use it for limited company accounts because that’s where the best value is for us.”***



Building consistency through feedback and collaboration

The feedback loop between the firm and the IRIS Outsourcing team has been instrumental in refining their processes. ***“The team actively encourages feedback from us,”*** says the manager. ***“They even ask for it on jobs we haven’t reviewed yet, and if we go a while without giving feedback, they’re persistent in scheduling calls to ensure we’re aligned. It’s great that they’re so enthusiastic about getting it right for us.”***

One of the primary goals was to introduce more consistency across the whole business. To achieve this, the team developed a master working papers spreadsheet to ensure uniformity across all jobs done by the IRIS Outsourcing team, which they now also use in-house. ***“We acquired a practice, and they had their working paper schedules. We had 3 or 4 versions in-house, so we ended up with 5 or 6 different reports for the same thing. We’ve unified that process now.”***



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The key to making it work is ensuring that they're providing the Outsourcing team with a quality brief. ***"We've found there's a strong correlation between the time spent on a job after we get it back from Outsourcing and the quality of what was sent to them. The better the quality of the work sent, the less time we need to spend on it at the end."***

The team is now standardising their internal processes for handling books and records, regardless of whether they are sent to IRIS Outsourcing. ***"We've made positive changes in the way we work and implemented those changes across the whole business."***





The company's growth has been a key indicator of the success of IRIS Outsourcing. ***"We've grown year on year,"*** says the manager. ***"We've managed to grow about 20% on our turnover in addition to what we've pulled in from the acquisition. Outsourcing has definitely helped with that."*** The company has adjusted its approach to outsourcing jobs based on complexity. ***"Sometimes we give them the simpler jobs, and we take the more difficult ones in-house, whereas we used to do everything ourselves. It's still a learning curve, and I'm still actively encouraging it. We have weekly or fortnightly meetings with the team to review the jobs outsourced, discuss the biggest issues, and provide feedback to make it better."***



“You get out what you put in”

One of the biggest advantages of IRIS Outsourcing is the consistency it brings to the team’s workflow. ***“My favourite thing is the amount of time we’ve managed to save,”*** the manager explains. ***“When you have a seven-hour job in the office, the background distractions – clients calling, people coming in, people asking questions – nobody really gets to have an uninterrupted work week. Outsourcing is, though. If we need seven hours of work, that’s what we get. It’s good to know that you’ve got that ringfenced as guaranteed capacity, because you never know what’s going to happen day to day in the office.”***

The flexibility of the outsourcing model has proven invaluable. ***“We had quite a lot of work from November through to last month, where we were really busy and needed help. Our account manager said, ‘Look, you do what you need to do. Your contract’s your contract, but if we get to the end of the 12 months and you need more, you need more. Just use it as much as you need.’ That flexibility has been great. We’re paying for a minimum of 100 or 150 hours, but how we use them and when we use them isn’t rigid. That’s been incredibly useful.”***



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The manager also shares some advice for firms considering IRIS Outsourcing: ***“Definitely get your systems in place for what you’re sending out, because it’s very much a case of you get out what you put in. That’s not to say you need everything to be perfect before you start, but take the time to look through your client base to see who would be appropriate for it, and be really clear on what you want from it. If you do that upfront, the results will be fantastic for your business, and I highly recommend.”***



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