IRIS

Peppermint Cloud Ltd
ACCOUNTANCY & TAX

It "had to be IRIS" as Peppermint Cloud starts up in practice

CUSTOMER PROFILE

Wiltshire-based Peppermint Cloud Ltd is a young, rapidly growing practice that serves a wide client base ranging from landlords to personal trainers, builders to professional services firms.

BUSINESS CHALLENGE

To source a solid bedrock of reliable, integrated accounting and practice software to support compliance work, facilitate collaboration and release as much time as possible for client care.

SOLUTIONS USED

IRIS Accountancy Suite
IRIS OpenSpace
IRIS Practice Management
KashFlow
IRIS WebPortal

A different approach

When accountants Hannah Walton and Karen Fletcher struck out on their own in the summer of 2018, it was the fulfilment of a long-held dream for the two friends.

Hannah explains, *"In our previous employed roles we'd gradually become more removed from interacting with clients, so the opportunity to develop and connect with our own client base was a huge driver for us both. As we hoped, we're finding it rewarding to relate to clients at a personal level, knowing we're adding value to their business, not just crunching the numbers for them."*

Rejecting the rather stuffy image of the traditional accountancy practice, Hannah and Karen take a pride in being approachable and speaking plain English. The company name reflects the two directors' fresh take on providing accounting and business advisory services and their commitment to using cloud-based software.

Choosing the best

The way Hannah and Karen deploy technology in their practice is integral to their innovative approach: in setting up Peppermint Cloud, they purchased the full suite of IRIS products for compliance on tax, accounts, company secretarial and fixed assets register.

Hannah had been using IRIS for some years and saw it as the natural choice: *"It had to be IRIS. It's the best and we didn't consider any alternative. With fully integrated software from a single source, we have more time for clients – and happy clients are the reason we're in business!"*

Along with Microsoft Office tools, all IRIS software in the practice is delivered under the IRIS Hosting service from a secure, remote location. Hannah says, *"This enables us to be 99% paperless, with all the efficiencies that brings, along with the great benefit of being able to work anywhere: in the office or sitting with clients over a coffee. There's no limit to its potential."*

Hannah and Karen have found their IRIS account manager extremely supportive of their new venture. Karen comments, *"He enabled us to establish a practice that runs smoothly and efficiently with minimal outlay, explaining how to customise the software to be a perfect fit with the business. Several months down the line, he's still there to advise and support us. Nothing seems too much trouble."*

As a new IRIS user, Karen also praises the IRIS Customer Support team, *"The service is first class. Any technical queries are resolved quickly; so rather than worrying about our software, we have more time to do what really gives us a buzz: helping our clients."*

Keeping everything on track

IRIS Practice Management has been a subsequent addition to Peppermint Cloud's portfolio of IRIS solutions. It's proving invaluable in helping Hannah and Karen to manage

their joint workload and collaborate closely even when they're working out of different locations. *"We know exactly where we are with every job and what needs to happen next,"* says Hannah.

"IRIS Practice Management helps us to be methodical in storing correspondence, sending out letters of engagement and so on, and the data mining is brilliant. We did consider purchasing a stand-alone customer relationship management system, but it would have been over the top for what we need. IRIS Practice Management does the job for us." Once again, the software draws on data already stored in IRIS, so manual data entry is minimised.

"The response to KashFlow has been very positive. Clients love using it. In recommending KashFlow, we're helping them to be more efficient and better informed about their business."

— Hannah Walton - Peppermint Cloud

Preparing the way for Making Tax Digital

As new Peppermint Cloud clients come on board, they are encouraged to adopt KashFlow, the accounting software that integrates fully with IRIS Accounts Production. KashFlow helps to create a steady flow of client data into the practice all year round, which enables Hannah and Karen to keep a watchful eye on the client's income and outgoings. It will also ease compliance with the requirement for quarterly reporting when Making Tax Digital comes into force.

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A seamless client experience

Hannah and Karen have just signed up for the IRIS WebPortal website creation and maintenance service, having decided that it makes sense to leave a specialist task like this to the experts. Karen says, *"We thought of pulling something together ourselves, but it's more cost-effective to delegate to people who know what they're doing, and we can then focus our valuable time on clients."*

Their brand-new website won't only market Peppermint Cloud; it will include a secure client portal to give clients access from any device to IRIS OpenSpace, the collaborative tool for document exchange and electronic approvals. Hannah notes, *"IRIS OpenSpace is a game-changer in allowing us to store and share client's information in a safe online portal, especially with the advent of the GDPR."*

Hannah and Karen are clear about the value that IRIS has already brought to Peppermint Cloud. As Hannah says, *"When you set up in practice, you soon realise that you can't do everything yourselves – nor should you try. Having a trusted network of support and service is priceless and it's one of the many reasons why we don't hesitate to recommend IRIS."*

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