CASE STUDY

IRIS

J.H. Greenwood & Company is closer to clients with IRIS software

J H GREENWOOD & COMPANY
CHARTERED ACCOUNTANTS

CUSTOMER PROFILE
J.H. Greenwood & Company was founded in 1980 by Jim Greenwood. Since then, the firm has expanded steadily in size, client base and the area it covers. The J.H. Greenwood team now comprises four principals and twelve staff.

BUSINESS CHALLENGE
To deploy technology strategically with a view to increasing efficiency and releasing resources to continue building close client relationships.

SOLUTIONS USED
IRIS Accountancy Suite
KashFlow Online Accounting
IRIS OpenDocs

From its offices in Berwick-upon-Tweed, the northernmost town in England, J.H. Greenwood & Company works with clients in both England and Scotland.

The firm has a diverse client base, ranging from sole traders to large companies. A significant number operate in agriculture.

Seeking the benefits of a fully integrated accountancy system, J.H. Greenwood migrated from Sage software to IRIS solutions in 2012.

Gillian Greenwood describes the improvements that resulted from the move: "We handle our clients' accounting, taxation, payroll and finances, and with many clients being owner-managed, there is often a cross-over between their personal and business finances. With IRIS having a single database, a change made in one area feeds through to another - all without having to rekey in the data."

Integrated solutions
for compliance, practice management, bookkeeping and document management keep all client and business data together and easily accessible

Connect with clients
Being able to share data online with clients supports the firm in expanding the area it serves

Online collaboration
Data flows from the client's KashFlow bookkeeping software into the firm's compliance software throughout the year

Time-saving
With a single database, IRIS eliminates duplicate data entry

Paperless
Electronic document management reduces paper usage and provides remote access to documents and emails

Excellent support
Responsive service from a software provider committed to innovation

Gillian also notes how implementing IRIS Practice Management software has helped in running the busy firm: "Moving to IRIS was the first time we'd had proper practice management software in place and it has made it easier to manage both workflow and workloads. It's much simpler to print off a report than to have to populate an Excel spreadsheet. Filling in daily timesheets encourages the team to think about how to allocate their time. It has improved billing accuracy, too, as we have full visibility of where the time has been spent. This helps a lot if there's ever a query from a client about the invoice."

Gillian adds, "The transition to IRIS was a big change for our staff, but they can see the benefits. IRIS looks nicer and is much more user-friendly than our previous software."

Distance no object

J.H. Greenwood also uses KashFlow online accounting software, which Gillian says has proved invaluable in helping to keep clients' businesses on track: "KashFlow has brought us closer to our clients. With data constantly coming in from their business, we can monitor what is happening and take action if we think they are coming adrift." Gillian gives an example of how KashFlow enables the firm and its clients to share the same view of the data: "We have a client many miles away over on the west coast. When they call, I can instantly pull up their account and have a productive discussion there and then."

> *"The use of KashFlow has increased our ability to have and maintain this close working relationship with our clients."*

KashFlow has proved transformational, as Gillian explains, "Our relationship has never been about having a once-a-year meeting with a tax bill at the end of it. The use of KashFlow has increased our ability to have and maintain this close working relationship with our clients."

Furthermore, KashFlow helps to meet the increased demand from banks for more regular information: "Nowadays, it's not enough to provide a set of annual accounts. The bank wants to know how a business is performing today, not eleven months ago, and having data available electronically makes life a lot easier."

Expanding use of IRIS

In a further development, the firm implemented the IRIS OpenDocs electronic document management system, with the goal of making it easier for the team to securely access and share documents.

Gillian explains, "IRIS OpenDocs brings together all the documents relating to a client's account, with emails being stored consistently and automatically. I find it's now quicker to pull up a document when a client calls. In addition, when I'm working from home, I have the same access to documents as when I'm in the office, without having to take twenty files home with me."

Once again, the integration throughout IRIS is a big plus: "Everything coming into the IRIS suite is recorded in IRIS OpenDocs – it's a great help."

IRIS OpenDocs has the advantage of cutting down on paper consumption, with all the associated costs this involves: "It's a gradual process, but we're pruning down our use of paper all the time," notes Gillian.

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The added value of IRIS

Gillian sums up the impact of using IRIS, "Together, all the IRIS solutions we have implemented help us to improve our efficiency and reduce the time we need to spend on routine compliance work. This is better for us and better for our clients, as it helps to keep our fees competitive. What's more, our increased efficiency in using IRIS frees time to add real value to the client's business. Rather than just crunching the numbers, we can be their partner, helping them to gain control of their business."

Gillian has been equally happy with the firm's choice of IRIS as its software provider: "I have no reservations at all about recommending IRIS. Our account manager is brilliant and always gets back to me. The IRIS support team are equally helpful, working hard to find us a solution and listening to our feedback and ideas for further development. They're on the ball and keep on top of things 100%. So, for example, we receive a new service pack just as soon as any of the software has been updated."

Gillian also attends the annual IRIS World conference for IRIS customers as an opportunity to keep up to date with the latest developments and to network with other practices.

Gillian is upbeat about the future: "Confidence is growing among the local business community. At J.H. Greenwood, we love helping to companies to grow and our IRIS software supports us in doing this."

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