Case study

Sinclair Scott

Proof that any size of practice can go paperless

How Sinclair Scott has increased efficiency and customer service levels using IRIS Practice Management

Dedicated to providing a first class service for their clients, Sinclair Scott is a firm of 4 partners and 13 staff, based in Ayr, Scotland. The company was created following the merger of established firms Sinclair Maclean, formed in 2000, and Alfred T Scott, formed in 1901.

The problem

Initially Sinclair Maclean only used IRIS Accounts and Tax software as Andrew freely admits "At the time we thought we weren't a big enough firm to use IRIS Practice Management. We used a system of spreadsheets to list the jobs as they came in and this worked reasonably well."

However, things changed when Andrew read an article in the IRIS newsletter in 2005, about a firm that had decided to go paperless. Andrew explains, "We were of a comparable size to the firm featured and as we were looking at a possible merger with another firm (Alfred T Scott), we knew space would become an issue. It seemed that installing IRIS Practice Management would be a natural progression."

The solution

Andrew and his team felt the benefits immediately after installing IRIS Practice Management, especially in terms of space gained. Since deciding to become paperless, the firm has halved the number of files stored.

All incoming mail can be securely scanned into the system, automatically linking all documents and accounts to their respective clients. Originals are destroyed to ensure the firm does not accumulate paper. The process for outgoing mail has also been streamlined by using IRIS AutoMail to generate correspondence and wherever possible standard letters are used to save time.

The transition to a paperless environment was embraced positively by staff having had a day's training on the system prior to implementation. Andrew feels strongly that training is essential for success. "Although you won't learn everything during the training, staff will feel familiar with the package."

Aside from achieving a paperless office, Sinclair Scott have realised other benefits, as Andrew explains "IRIS Practice Management has allowed us to increase efficiency in a number of different ways. The task planning is going well and we always know where jobs are. We made the conscious decision to keep the number of stages for each job to a minimum so as not to get too complicated and we find it very simple to run the reports which give us a full overview."

They have also been able to analyse client activity more effectively and in turn continue to excel in providing superior customer service. Any of the staff and partners can access each client, Andrew adds, "We also like being able to see all client information from a single screen, even down to whether the bill has been paid or not and we particularly like the fact that the staff are all sharing the same data."

Andrew concludes "Going paperless with IRIS Practice Management has increased our efficiency overall and we can always be sure that the filing is completely up to date. It is one of the best decisions we've made. The winning combination of good staff and IRIS allows us the flexibility to do what we want to do."

The future

The next stage in Sinclair Scott's bid to become completely paperless is to look at using emails wherever possible to communicate with clients.

"My advice to anyone thinking about the paperless route and whatever their size, would be to go for it! It is one of the best decisions we have made."

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