

A more professional way to manage company secretarial services for clients



A more efficient way to manage deadlines for clients and automatic production of forms, compliant company registers and other documents, together with major time-saving for senior members of the practice were just some of the reasons why a Perthshire firm of accountants made the move to become an Inform Direct customer.

Kelly Accounting, which was established in 2002 by David and Susan Kelly, is based in Crieff and now has a team of six offering a full range of accountancy services to a portfolio of clients located from Shetland to New Zealand.

David Kelly says: "Susan and I decided to set up a practice after completing our accountancy qualifications and working for a while overseas. In fact, it was a busy time for us – within the space of six weeks we had acquired a puppy, moved house, set up the practice and had a child!

"As a full service accountancy practice helping with payroll, tax, business sales, VAT, and company secretarial, we have built up our client base over the years and enjoy a high retention rate of businesses operating in a number of sectors.

Technology

"Early on we wanted to establish ourselves as a practice that was technologically advanced and different from some of our competitors, so have invested in a number of software platforms to carry out different accounting functions, with the objective of using the best of the breed in each case.

"Suddenly being tasked with a more complex company secretarial task for a client led us to Inform Direct who we had previously met at Accountex – and we have never looked back.

"Previously we had kept all our company secretarial requirements on a spreadsheet, using the Companies House system – which was pretty basic. We knew we needed a more sophisticated system which allowed us to do more – and where the key information for all our clients was presented clearly in one place, so that no deadlines were missed.

Adding value

"Inform Direct is a very user-friendly system to use. It's clear and logical, making it easy to find the right information and submit forms correctly first time. We also appreciate the friendly support team who are always able to help and solve any queries we may have, quickly and efficiently – and they even imported our client database, so we were up and running very quickly.

"Now our administration support team can easily produce professional-looking forms for clients, such as share certificates, dividend vouchers and statutory registers. They're well-formatted and need minimum input from us.

"We can deliver the service efficiently and effectively and add value at the same time. By using Inform Direct we save time compared to using a combination of Companies House and spreadsheets – and can offer our clients so much more.

"Quite simply it has streamlined our practice systems and saved a huge amount of time, particularly in relation to new company formations and has released senior members of the practice to focus on other matters."