



Well-designed company secretarial software is essential to manage large client portfolio

Rapid growth – and a resulting large client portfolio – accelerated the need for a north-east firm of accountants to identify and adopt software to keep pace with demand and give added value to clients.

Derrick Hutchinson and Jane Freeman established JFS Torbitt Accountants ten years ago and found that the rapid expansion of their practice sharpened the focus on automating key processes to ensure accuracy and maximise efficiency.

With two offices – a head office in Birtley, County Durham and a satellite office in Blyth, Northumberland – and an expanding team of 18 people, JFS has a growing portfolio of around 1,300 clients, across a range of sectors.

The holistic business consultancy offered by the practice comprises accountancy services including company secretarial compliance, business planning, taxation, payroll and wealth management.

Efficient management

As Practice Manager Derrick explains: “It became very clear that we could no longer rely on manual records for our company secretarial services. A spreadsheet would simply not do the job in terms of managing hundreds of clients efficiently and the login requirements for each company at Companies House were laborious.

“I first came across Inform Direct when looking for a template for a stock transfer form and found something that not only pre-populated the form itself but also generated the required minutes, new share certificate and wrote up the statutory books too.

“I quickly registered and subscribed after seeing straightaway how useful the platform would be, with a comprehensive range of features and functions that we might require for our clients’ individual needs.

Superior system

“The way the system has been set up means that it is hands down better than any other of its kind. Everything is well laid out, with lots of shortcuts so we can change shareholder information and create new documents instantly. There’s also a great overview of all our 500 incorporated clients, where we can see deadlines – including accounts filing dates and confirmation statements – at a glance.

“One of the key benefits it has given us is reassurance that we are not missing any deadlines, as well as saving time and being accurate. Even for a standard confirmation statement, we save ten minutes per client. The savings quickly add up for clients with additional transactions, especially when they’re more complex.

Team support

“It’s intuitive, easy to use and the support team is fantastic. We have five people using it in the practice who have trained each other, getting telephone help if needed.

“As a practice we have always sought technology that will help us and our clients. It’s interesting to reflect just how quickly we have progressed on the road to becoming a completely digital practice, using a range of packages including Sage Business Cloud, Xero, Cashflow Manager, AutoEntry and of course Inform Direct to achieve this.”