

Inform Direct transforms company secretarial service for West Midlands accountants



Using Inform Direct as an integral part of its office systems has transformed the way a West Midlands accountancy practice handles company secretarial requirements for its 200 clients.

Ragavan & Co. was established in 1990 by Sunth Ragavan and specialises in providing services for SMEs, from sole traders through to larger companies. Around 75% are located within a small radius of its Birmingham base; the remaining clients are in other parts of the UK, including London.

Services include helping business start-ups, bookkeeping, accounts preparation, VAT, payroll, taxation and tax planning.

Immediate benefits

During a month-long free trial of Inform Direct, it immediately became clear that what was on offer would be particularly useful in their daily work for clients.

Sunth says: "Historically we had kept manual systems for our clients' filing dates – at the very start as a handwritten schedule which seems archaic now! More recently we maintained an Excel spreadsheet but even this was becoming more difficult to manage as our client base grew.

"With Inform Direct, it meant we could not only do this more efficiently but be reassured we hadn't missed anything. It saved significant time and the fact that all our client information was integrated on the portal saved us from inputting data in several different places.

"We saw that being able to produce printable dividend vouchers was a real benefit, enabling us to offer a better service to our clients."

Just as dividend vouchers are particularly useful for Ragavan & Co, many accountants have been able to extend their offering to clients with branded share certificates, attractive company registers and a comprehensive range of minutes, resolutions and other documents – all fully pre-populated and available at the touch of a button.

Working smarter

Sunth continues: "As an established practice in our area, we have a loyal client base many of whom have been with us for 20 years and appreciate our personal and timely service when dealing with their affairs. Having these processes automated with Inform Direct saves so much time that we can work smarter, adding value to our service.

"Initially I was the only user but I have now trained two other members of our team so that I can delegate this process and only need to do a final check, freeing up my time to focus on other aspects of the practice.

"It's easy to use but also really helpful to have advice at the end of a telephone or know that one of the knowledgeable Inform Direct team will respond quickly to an email query.

Best package

"We do use other software packages to carry out different functions within the practice such as bookkeeping and tax returns. I would rather do this than have one package that supposedly does everything where you are totally reliant. Choosing the best for each aspect has worked for us and Inform Direct is a case in point for company secretarial services.

"As we continue to grow – and there's plenty of potential SME business in the West Midlands – having the right systems in place means we can confidently take on new clients and know that we can offer them a high quality, efficient service."