

# Company secretarial software streamlines systems for Welsh accountancy practice



Any new piece of software must meet exacting standards for one Welsh accountancy practice – and to pass this test, Inform Direct had to provide real, practical benefits which would enable it to deliver an even better service to clients.

Child & Child, a family-run firm headed up by father and daughter, John and Rachel Child, has a team of ten and offices in Abertillery, Monmouth and London. It was using manual processes and filing directly at Companies House to fulfil company secretarial requirements for clients – until Senior Manager Dave James, who joined the practice in 2019, suggested they consider changing to Inform Direct.

## Trialling the software

Dave says: “It’s so easy to continue using an existing system and not even consider other options. If the existing process seems to work, you assume there’s nothing noticeably better out there for you. The idea of making a transition – when you want to focus on building the business and looking after clients – instinctively feels too time-consuming, involving moving data and training staff on a new system.

“I knew it may not be easy to convince the partners to switch, because they’re rightly focused on ensuring everything we do is about providing an efficient service for our clients. So, as part of a wider project to look at cloud-based systems for various areas of our business, I spent time trialling Inform Direct and considering how it might help us, before talking to the partners about the benefits it could provide.”

Accountants can take advantage of all the features of Inform Direct as part of a one month free trial so they can see how it could work for their practice – and the software can be used to complete work for clients during the trial. Although it’s easy to pick up and start using, training and support are always free of charge.

## Saving time, creating value

Dave continues: “Straightaway the partners could see the advantages it offered in terms of saving time, ensuring accuracy and providing reassurance that we were fulfilling statutory requirements.

“They were particularly impressed by only needing to enter client data once, avoiding duplication and potential errors. For example, transfers we record are automatically included in the appropriate confirmation statement, so there’s no risk of omission.

“A holistic view of all our clients in one place – and being able to export a report for all clients’ accounting and other deadlines – makes it easier to plan and keep on top of all the important dates. Whenever we need to submit a confirmation statement or another Companies House filing, the ability to more easily obtain client approval really speeds up the process.

“There’s a range of features which enable us to offer more to clients. Everyone likes the professional way board meeting minutes and other documents can be produced. And there are other features too, such as email notifications which alert us if the strike-off process has started so we can contact the client and avert a problem.”

## An easy switch

The switch was really simple to make since Inform Direct had a tool to automate adding all client companies on to the system. Bespoke features, such as the ability to record the manager’s initials against each client for easy reference, have enabled the practice to tailor the software to their needs.

Several months on, all of the team at Child & Child who undertake company secretarial work are happy using the system. Inform Direct has proved easy to learn, built around intuitive, automated processes and helpful system prompts – with phone, ‘live chat’ and email support available when required.

Dave continues: “The customer service is brilliant. You can tap into the team’s knowledge and in-depth company secretarial experience. I also find all the technical articles on the Inform Direct website really helpful in solving client problems.”

John and Rachel Child conclude: “All the benefits Inform Direct delivers for our practice have really helped us to streamline systems, giving us more time to look after our existing and loyal clients, as well as find new business.”