

Intelligent and intuitive software specifically designed for today's practices



A desire for more modern ways of working was the catalyst for making the move to cloud-based software for an established accountancy practice based in Crediton, Devon.

HW Martin, founded by Harold Martin and run by Matthew Phillips as Partner, historically used an integrated software package to manage its range of services for clients.

Within this, the original company secretarial module lacked the features and ease of use they wanted and although it had been updated in recent years, this had resulted in disjointed functionality which didn't meet current practice requirements.

Next-generation software

John Sweeney, Tax Office Manager, says: "The Covid pandemic accelerated changes to the way we work. We needed to move away from our team accessing everything on computers in the office and provide easy remote access for staff working from home.

"Cosec was a priority in terms of finding an alternative web-based provider. We couldn't do everything we wanted to in our previous software. That meant we often had no choice but to go directly to Companies House – or were tempted to do so anyway because the software was so time-consuming to use!

"After researching the market, we found Inform Direct. The free trial they offer is a winner, meaning we could check out the software without cost or commitment. It enabled us to see exactly how it would work in our practice, in real-time, and using our own data.

"Straightaway I could see that this was next-generation software which had been created from the ground up, with all the features under one roof for the cosec service we need today."

The practice makes active use of a huge range of Inform Direct features. That includes confirmation statements, fully integrated company formations, officer and PSC changes and company accounts. Alongside basic share transactions such as transfers and allotments, the team also process dividend payments and now have the confidence to undertake more complex share reorganisation transactions.

Designed for accountants

John continues: "We find it really intuitive to navigate, with everything specifically designed to make life easier for accountants. Intelligent validation and messaging along the way help all our staff complete tasks quickly, correct first time.

"Client data is easily re-used throughout Inform Direct, removing a need for re-entry and saving huge amounts of time. Seamless, two-way integration with Companies House means everything is current, with automatic updates when due dates change or clients make their own filings.

"Compliant document templates – such as minutes, resolutions and certificates – give real added value to clients. They are automatically pre-populated and look professionally-produced too. We create about 1,000 documents a year in this way, each instantly at the touch of a button."

A better way of working

HW Martin manages around 200 companies, across a range of sectors, on the platform. Inform Direct helped to bulk import these from a csv file using data from Companies House, so they were up and running very quickly.

John concludes: "Inform Direct is just so much better. It makes carrying out the cosec tasks we need much more enjoyable, with the added reassurance that it's all accurate. The fact it's cheaper than our previous software is a fantastic bonus.

"The support of the Inform Direct team, who are experts in company secretarial practice, has also been invaluable when we have had more complicated client situations to navigate.

"Since subscribing, we really haven't looked back and it has paved the way to our introduction of other 'best in class' cloud-based options for different practice functions which are now also working really well for us."