



Inform Direct helps growing practice to meet client demand

Increasing requests from clients for help with their company secretarial work led the founders of a rapidly expanding accountancy practice to turn to Inform Direct.

Thomas & Clark Limited, formed in 2022 by accountants Lee Thomas and Vicky Clark, have offices in Wigton in Cumbria and Bedlington in Northumberland, with additional remote staff across the UK.

They offer accountancy and payroll services to sole traders, partnerships and other small businesses throughout the UK, across a range of sectors but with special expertise in the pet industry.

Harnessing automation

Lee knew he needed software which would automate much of the work and dovetail with their other practice software, such as Xero. After a shared screen demonstration from Inform Direct detailing just some of the automation options available, he knew it would be ideal for their requirements and subscribed immediately.

He says: "With client demand for company secretarial work increasing, we didn't want to turn work away. We needed to find software that could handle the tasks without taking up too much time and diverting us from our core services.

"We actually have a waiting list for clients to sign up with us; so, we really needed a solution which would be simple to implement, where we could hit the ground running without needing lots of training or having to read a manual.

"With Inform Direct we got exactly that: a solution we could use straight away to complete real work for new and existing clients.

Quick to get started

"Initially it was just Vicky and I who used the platform. We were quickly able to add our 50 or so client companies. Now other members of our team can log in independently and carry out much of the work, including adding new clients, which leaves us to focus on growing the business."

Right from day one Lee and Vicky found Inform Direct easy to use.

"We really like the step by step processes, which make any transaction easy to complete", he adds. "Everything is designed to help us save time. Documents such as minutes and share certificates are also instantly populated and look great for clients."

Deadlines always visible

Vicky continues: "We love the colour-coded reminders, which show us at a glance which work needs to be done. They enable us to keep absolutely on top of filing deadlines across the practice as it grows.

"That level of reassurance is invaluable, as we focus on delivering a great service to our existing clients, as well as welcoming new additions to our portfolio.

"Having introduced Inform Direct to our practice, we use it every day and it's embedded completely into our systems. It's helped massively in terms of our ability to offer a comprehensive company secretarial service, now and as our business continues to grow."