



CASE STUDY:

Sheards

Sheards Chartered Accountants
and Business Advisors



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The Company

Sheards has been in business in Huddersfield for over a hundred years. Originally a family firm it was established by Fred Sheard, whose name it bore until 2003 when the last family member, Richard Sheard, retired. There are currently 3 partners, supported by a team of 10 accounts and audit personnel, 3 of whom work within the taxation and payroll areas, and all of whom are supported by an administration team.

The company has a wide range of clients most of which are owner managed businesses, consisting of mainly limited companies but also including some sole traders and partnerships. However, Sheards also carry out tax planning and compliance work for individuals. Huddersfield itself supports a diverse range of businesses which, generally, demonstrate a cautious approach to their business affairs. Whilst the current outlook is not so bright in manufacturing, retail sector businesses are doing well, and it is against this backdrop that Sheards combine traditional values with efficient, cost effective systems to provide excellent service for their clients.

The Challenge

Having conducted an intensive business review, Sheards installed the industry specific IRIS system to make the production of accounts and tax compliance work more efficient, and also to give more control over practice management. However, there remained one area which the partners felt needed to be improved - correspondence.

IRIS enabled them to manage their service but incoming and outgoing correspondence was not thought to be under control. Problems would occur tracking specific correspondence, especially when someone was away-typically requiring a member of staff to rummage through a pile of papers on the absentee's desk.

Having been a preferred and trusted supplier of IT services to Sheards for many years, Mitral Systems were called in to try and resolve this issue.

The Solution

After consulting on Sheards's precise requirements Mitral supplied them with 'Mailroom', a system that could afford them the control over correspondence they were looking for.

Now each morning the receptionist scans and indexes incoming correspondence against the client, template reference, and year. It is then automatically routed to the relevant person. Much of the paper received is original information that the client needs returning. This can now be done by return post, instead of cluttering up work area, as an electronic version is available to the practice for production. Most arriving correspondence is a trigger for user action and hence appears in an individual's work list, ordered by date received, with a suggested timeframe for further activity. Correspondence items turn red in the work list when overdue. If nothing needs to happen in answer to the correspondence, for example if more information is needed, the user can put the item in



Store, Search and Control... the easy way



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'Pending' with notes against it. This enables the whole business to share the information, avoiding the previously experienced problems that occur when staff are absent.

All documents are securely archived in the M-store repository for safe keeping, which also allows for instant retrieval.

Should a partner need to know what is happening with a job, they can query it and see exactly from a paper perspective what the current status is, what has been done so far, and what it is now waiting for. Indeed, using modern network communications the partners have access to the system from anywhere in the world, keeping them in control and helping to provide the quality of service their clients need and expect.

Outgoing correspondence, for example automated letters from IRIS and all documents produced in Microsoft Word, is filed and indexed automatically into the system at the touch of a button. The Mitral system automatically reads index fields – partner, preparer, client reference, year and template reference – so improving on IRIS which lists stored letters and does not provide a true archive of the letter itself. M-store Archive keeps copies of all documents, which cannot then be edited, together in a controllable archive.

The Result

Overwhelmingly the main benefit achieved by implementing the system is the ability to access incoming and outgoing correspondence quickly from any workstation in the office or, alternatively, from home via the Internet VPN (Virtual Private Network) connection. The ability to search by client, template, year, and staff member makes it "a piece

of cake". Documents are also "filed" away more accurately because most outgoing documents are indexed automatically, and the incoming documents can be re-indexed by the person dealing with the piece of correspondence. It is now possible to manage and prioritise incoming communications much more effectively. Filing is not a problem anymore, as there is no paper correspondence to file!

Partners can now detect if something has not been dealt with because they have access to all staff worklists. Queries from clients can now be handled easily and effectively since there is no need to track down the correspondence from various desks and filing trays around the building. Richard Lay, Partner, commented that they now have "confidence that correspondence is being dealt with in an efficient and timely manner". He went on to say "We feel more in control. I really don't know how we coped before, I don't want to think about it!".

The Future

Sheards are now investigating, with Mitral, the idea of using secure web client access and the possibility of CD export for bulk information. Mitral continues to look after Sheards' network, server, telephone system and give general IT support in addition to the installed M-store Archive and Mailroom system. Richard Lay is happy to recommend Mitral saying: "We are delighted with the service we receive from Mitral. Whenever we encounter an IT problem Mitral always provide solutions that suit us".

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