.IRIS

Mossley Tax Shop experiences "amazing" support in making the move to IRIS

MOSSLEY TAX SHOP

CUSTOMER PROFILE
Mossley Tax Shop are accountants and tax advisors based in Tameside, Greater Manchester

BUSINESS CHALLENGE
To free time for client work by eliminating IT management issues

SOLUTIONS USED
IRIS Accounts Production
IRIS Business Tax
IRIS Personal Tax
IRIS Practice Management
IRIS AutoMail
IRIS Company Formations
IRIS Company Secretarial

Having started small by working from home, Mossley Tax Shop owner Yvonne Cookson opened the doors of her office premises in Mossley near Manchester in 2011.

In just a few short years, the practice had grown from 90 clients to 570, an increase that is surely attributable to the passionate dedication to client service shown by Yvonne and her four-strong team.

The all-female team brings a refreshing, straight-talking approach to doing business and to demystifying accounting for their clients, who range from self-employed freelancers to partnerships and limited companies.

Most new business comes from word-of-mouth referral from the rising numbers of clients happy with the way the team provides friendly expert help on everything from self-assessment declarations to year end accounts, VAT returns, CIS payrolls and daily bookkeeping.

Seamless integration
An integrated suite of software for compliance and practice management eliminates duplicate data entry

Time-saving
Up to two days a week, previously spent updating software, can be invested in the business and client care

Excellent support
Highly responsive service from IRIS account management and customer support teams

Compliance covered
The IRIS Accountancy Suite handles all Mossley Tax Shop's core compliance work and ensures they are up-to-date with the latest legislation

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Removing IT headaches

Previously a user of CCH software, Mossley Tax Shop moved to a suite of IRIS compliance and practice management products in September 2013.

Yvonne explains why she made the move: "The CCH product worked well but keeping it up to date was a headache. We had one of the team spending up to two days a week downloading updates and configuring them for our practice. That's a big overhead for a small practice without a dedicated IT specialist on board and we hadn't realised this would be necessary when we bought the software."

In addition, Yvonne notes that customer service was frustratingly non-existent once the solution was in place: "There was no post-purchase follow-up and whenever we needed support we waited hours for a call-back. This lack of response is especially galling if you're doing your utmost to provide excellent service to your own clients, as we are."

When Mossley Tax Shop was approached by IRIS, Yvonne was immediately impressed by the customer service: "Right from the start it's been a fantastic experience. They worked with us to provide the package that was right for our practice and made migration easy. We now we have two attentive IRIS account managers checking it's all going well. We love IRIS!"

Mossley Tax Shop implemented modules from IRIS Accountancy Suite for accounts production, business and personal tax, company administration, and practice management, as well as IRIS AutoMail to streamline the production and tracking of client correspondence. The practice also uses IRIS Payroll software.

Yvonne was delighted with the technical support that IRIS provided during the migration, "They took us under their wing and did everything possible to make the migration straightforward. The support has been amazing. I can't thank the IRIS Customer Support team enough for their help throughout the transition."

Making life easier and more efficient

Although, as Yvonne notes, the two accountancy solutions - CCH and IRIS - are very different, the practice team quickly came to grips with using their new software: "We had a day's training, which was helpful in making an effective start, and we've lined up another day to reinforce and extend our use of the system. In the first few months of using any new software, you need good support. There was always someone to ask for help in the early days if we encountered anything we weren't sure of. If you ring up IRIS the call is answered immediately and they can usually resolve the issue there and then."

The team soon found that using the integrated IRIS database was a huge time-saver: "The integration is great and makes life so much easier and more efficient. We enter the data once and then it flows through to all the relevant fields across the suite. The two days we save on updating the software plus the time we save by not having to re-enter data can be used to do the actual work and build relationships with our valued clients."

Keeping control of practice growth

Yvonne is now enjoying using the IRIS Practice Management solution to handle the enviable challenge of managing the growing business: "I use it all the time. It gives me a real-time overview of our workloads, helping me to see what jobs we've got in, which members of the team are doing work

for which clients, who we're doing VAT for and so on. This gives me greater control of the business."

Yvonne has plans to mine the practice database using IRIS Practice Management to introduce clients to one another and hence develop a useful revenue stream in referral fees. Other developments in the pipeline are to use IRIS AutoMail more extensively to automate correspondence.

These developments, however, are on hold until after this year's self-assessment 'busy season' is over. Yvonne says: "With the IRIS Accountancy Suite now an integral part of our business and the IRIS support team on hand to help, we can face with confidence whatever the busy season brings. We feel really well looked after."

Key Features

IRIS Accounts Production

- *Automates the vital but essentially routine task of preparing final and statutory accounts*
- *Covers sole traders, partnerships, LLPs, limited companies, pension schemes, academies and groups*
- *Fast and accurate client creation with direct access to Companies House records*
- *Fully iXBRL compliant*

IRIS Practice Management

- *The centralised hub for storing and sharing all your client data*
- *Includes workflow, tracking of correspondence and powerful data mining functionality; CRM for accountancy practices*

IRIS AutoMail

- *Client correspondence made easy*
- *Automates the production of all your client letters and emails*

IRIS Company Formations & IRIS Company Secretarial

- *Automated, quick and simple incorporation of companies*
- *Updates for pending application status are detected direct from Companies House*
- *Complete Companies House forms, including minutes, and file online*
- *Includes seamless access to Companies House online service (CHOS), giving you an e-file audit trail and status of each job*

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