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Do you prefer what you're doing now?
It's exciting: working with staff and seeing our offices; working with clients on projects that provide value to them, teaching them about tech they wouldn't otherwise be aware of.

My work is less accountancy-focused now, but clearly I retain the fundamentals. I do lots of CPD-accredited training related to my role – so it's not a problem keeping that up.

David Rudd is senior client manager and business growth accountant at Colchester-based Wood and Disney, an AdvanceTrack client

What's your current role?
If a client has any issue I'm there to help them deal with it. Sometimes that can be historic compliance issues, but more recently it's about 'where they want to go', 'what will be the impact of me doing A, B or C'.

I'll try and get to the heart of it – to understand what they really want to do; often their direction is not tax-related at all.

How has your role developed?
I've been here three years. At first it was similar to what I'd done before: accounts; corporate tax; and returns. Now everything's in the cloud and in one place it becomes much easier to project forward for our clients – this leads to project work that isn't about just compliance.

One client had 50% of turnover tied up in debtors – we then became their back office so they could focus on the business. Now they've progressed and have their own bookkeeper, and we have moved onto strategic analysis at board level – they have a bigger team and the next set of issues to deal with, but their financial performance has skyrocketed.

I now look at tech and see if it can break… then, if it works, how can we evolve it to make it even better for us? We've looked at every process, every single thing we do – can we do it better, find a way to evolve it, or speed it up to get a better result for the client?

What has that meant for the running of the practice?
It means we're more goals-focused, which leads us to ask clients where they want to get to.

Using AdvanceTrack to take on accounts preparation and bookkeeping has freed us up to do other things.

While this created the opportunity for us to do different things, we then had to structure the team to work suited to them. We created an organisational structure to work out where we needed to head. Then we underwent DISC profiling to understand what people liked and what they should be doing.

If clients need specialist advice we now have strategic alliances in place… nearly every decision they make, they ask us first.

If we solve those problems then the tech will never replace that, because it's about trust and helping people, that's how we look at it. Tech's not enough to solve the complex problems people face.

Have you had to learn new things?
It's certainly taught me how to better speak to clients, and then I flipped it [onto managing director Peter Disney and operations director Brendon Howlett] and did it to them…

I'd never had or taken a board meeting or 'taken charge' of things – so that's been transformative for me. That's all from Brendon and Peter pushing me. I've also had some soft skills training, which was massively important – to better understand people.

Kevin Reed **is a freelance journalist and former editor of** ***Accountancy Age***

Facing up to the latest developments in practice technology

As you read this, we at AdvanceTrack will be getting up close and personal to many practitioners – it is conference season, after all.

Hopefully we've managed to cross paths with you at either our own conference, or Accountex. Come back for next month's *Inside Outsourcing* for a more detailed rundown of what was presented to practitioners across these major shows.

ACCOUNTEX
1-2 MAY 2019 ExCeL | LONDON

Breaking news

AdvanceTrack is looking to work more closely with practices… and those that do so will benefit from a 'premium plus' service. More details to follow next month – but for now, those interested in finding out more can contact us via the details below.

Speak to AdvanceTrack about helping you create a modern and profitable practice. Call us on +44(0)24 7601 6308 or email advice@advancetrack.com

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Role rehearsal

Find out what's in store for you and your staff, as practitioners reveal how tech has changed their working lives

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Face up to new tasks

What has technology-driven change meant for practitioners at the coalface? Kevin Reed gets the detail from four accountants about how their role has evolved as part of creating a fit-for-purpose and modern practice

Stephen Smallwood is managing director of Herefordshire-based practice Thorne Widgery

What's your current role?
As managing director, I try and run the business 'as a business'. For the running of the business, the fact that I'm an accountant is almost incidental. I do much less client work than I used to.

I've always enjoyed tech work more than compliance. I get a great deal of satisfaction from making IT systems work and delivering value, rather than filling in a statutory report.

We've been actively involved in moving from a traditional practice to one of the leading proponents of IT systems – not hardware and cables, but systems for how you run your business. We were awarded Small Firms Innovator of the Year at the British Accountancy Awards last year.

How has your role developed, and why?
In the past five to ten years, I've moved from being a typical, though progressive, accountant serving clients, to being a director of a business that operates in the professional services sector.

We're using Xero and its practice management module (XPM) and have converted to the cloud. We love it for our clients, but to my astonishment we've also ended up helping other accounting practices get the best out of modern and accessible software by helping them evolve their own back office. Altogether it has completely revolutionised how we go about things.

What has that meant for the running of the practice? Is it part of a broader strategic change?
I'd say that supporting other practices is now 15% of our business, which has developed from 'Xero' over the last three years. No accountant is normally allowed to get close and personal with other firms of accountants, but we do because of our knowledge of XPM. The result of that is we get to see some really interesting, good examples of practices, and we learn as well.

Our screens are full of pictures and graphs that allow us to analyse up-to-date information and find trends.

Do you prefer what you're doing now?
It's so exciting and so much more fun. Hereford is a small pond for us to fish so it has got us out and about and we've become a national practice.

Nathan Lewis is a client relationship manager at Bristol-based d&t Chartered Accountants

What's your current role?
As tax senior within the practice, I look at tax compliance and returns – along with some advisory work as well. I help junior members of staff, alongside dealing with HMRC enquiries – my background as someone who worked for the Inland Revenue and then during its merger to become HM Revenue & Customs helps.

How has your role developed, and why?
I see it as an evolution of tasks. The first online tax returns filed at the Revenue were printed off and then manually entered. And then, as I went into practice, tax software meant that boxes of clients' receipts were no longer required.

Tech has also changed us from being a local company to an international one, where we can communicate over Skype. With Xero and QuickBooks you can even 'take over' a client's desktop to show them how to use the software.

These tech platforms allow us to have much quicker access to client information. This allows us to review it more quickly, and plan for the future, rather than view information retrospectively.

What has it meant for the running of the practice and client service?
The tech enables one-man-band-style accountants to do more; so we have to use information and increase our value to clients – show them the extra things we can do.

The tax landscape is going to continue to change – HMRC wants to reduce the number of returns it receives – so we will look to offer more advisory-focused services and tax planning rather than looking backwards.

Up-to-date information is going to become even more important. Look at IHT for example, having the ability to see a client's position and plan things such as gifts out of income for the years ahead.

Andrew Perrett is cloud accounting manager at TC Group (formerly Taylorcocks)

What's your current role?
It covers lots of different things: the main role is to review cloud software and help staff and clients use technology. For clients, I help them with the scoping process to best choose tech solutions, then onto implementation and training.

As there's only one of me, I'm also training team members so they can offer basic advice around accountancy software and add-ons.

How has your role developed, and why?
The role began officially in January 2018. I've been at TC for more than 11 years, qualifying as an accountant and then working with another manager to support a partner with their portfolio of clients.

I was looking after fewer clients than the other manager but my clients required more work: bookkeeping, monthly accounts, management reports. And then we looked at a way of managing my clients more effectively. Between the partner and myself we developed a process to get clients onto Xero using automated invoice capture, through to bookkeeping and reporting. With every client on the same process it made the whole thing much smoother.

Once we had 30 clients onboard, we looked to take it out across our other offices. I became more internally focused during 2017 as this process went on – and so I transitioned over my clients to other staff towards the end of that year.

What has it meant for the running of the practice and client service?
All bookkeeping across offices is done on Xero – we had shied away from the service because it wasn't profitable. Now we actively go to win that and their whole process.

We do very much report back to clients – adding value through meeting people and discussing their up-to-date information.

Continued on the back page