

Helping us to grow

MHA Carpenter Box partner Kevin Blake talks about how significant organic growth for the practice could have left it short of resource, but having AdvanceTrack on board reduced these pressures while allowing the firm to focus on an improved client-centric service



Kevin, tell us about your practice

We are an award-winning independent firm based in the South East (we won the Xero Accounting Partner of the Year Award last year), and a market leader in the accounting world. Innovation is at the core of what we do and how we cater to our clients' needs. We look to add value at every opportunity to our client relationships by listening to the market and staying at the forefront

of technology so we can deliver tailored solutions and advice to our clients.

Our approach is pitched at adding value by delivering business and tax advice specifically tuned to the sector the client operates in, supported by the specific sector expertise within our national association MHA. We are constantly looking at ways to better serve our clients, and business efficiencies to improve the way in which we deliver our service.

When did you start using AdvanceTrack and why?

We started working with AdvanceTrack in 2009. Utilising business technology to stream your business processes is something we advise our clients on a daily basis, and when we heard about AdvanceTrack, we knew we had to take the advice for ourselves.

It has been a real opportunity for us to shift our efforts away from manual bookkeeping and focus instead on more profitable work for our firm. This means we can provide a better service for our clients, and keep our staff happy and motivated with more engaging work.

What impact has AdvanceTrack had on the running of your practice?

AdvanceTrack has been a key factor in facilitating growth in our business. We have been through a period of significant organic growth and the ability to call upon additional resource to assist has been beneficial.



We have also been under pressure with office space to accommodate growth despite moving to larger premises in Worthing and opening new offices in Crawley; outsourcing has helped mitigate in part these pressures from growth.

In particular, AdvanceTrack has allowed us to process more and in turn develop the skills of our team to deliver an improved client-centric service.

What is the future for your practice? What are you looking to achieve and how?

We know the future of accountancy is with the cloud and the encompassing technology, driving business efficiencies. This allows us to focus on the most important aspect of our work – the human experience that adds true value to our client.

With Making Tax Digital still on the horizon, the priority for us over the next few years is to assist as many clients as possible onto the cloud, providing them with a tailored service that helps them get the business information they need quickly and seamlessly, and being there as their trusted adviser to help them grow their business.



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Changing times

Driving change in a practice is much easier said than done. In the first of a two-part series looking at successfully achieving change, Kevin Reed begins by looking at the people factor – how leaders must consider culture, office politics and gaining buy-in from senior team members

Technological advances in automation, AI and outsourcing are feted as the keys to unlocking better client interaction, smoother and more efficient processes – ultimately, a more profitable practice.

So why don't firms just change, become 'better'? Many practices sit tight and eschew the various new systems and offerings currently on the market, because it's not as easy as pressing a few buttons to make your practice 'better' than it was before.

Practice leaders must set a path for change. But the long-standing culture (and legal structure) that is a 'partnership' does not lend itself to change, let alone with any pace or momentum.

"Leaving aside the Big Four and some of the top 20, I sense that most firms – even if now corporate entities – still have a partnership culture," says John Brace, managing partner at Harwood Hutton. "This is embedded and I think will take time with a new generation of partners and shareholders to transition to a corporate culture – assuming that is the aim."

As stakeholders, partners are often cautious on strategic decision-making that will involve change – as investment is inextricably linked to making new strategies happen.

"We remain very much a 'corporate partnership' and for the most part that works well – in truth there is a lot to be said for the partnership ethos particularly in considering business risk," explains Brace. "Partners are more

conscious of risk than executives even if they are shareholders."

But this attitude can hinder practice development.

"This does sometimes stand in the way of driving a business forward when it involves change," Brace admits. "And this is particularly relevant now with the changing marketplace for delivery of professional services."

Change at what cost?

Must leaders in practice push change through at whatever cost? Do they need to 'forget' the people below them, to not get bogged down in partnership politics?

Brace believes that practice leaders will involve people in change, but often too late in the process and without getting them 'onside'.

"Change does indeed involve people and the key is to communicate plans in advance," he says. "The challenge is to get team buy-in to change."

Peter Gillman is the former executive chairman and MD of Price Bailey – serving at a time when it developed and grew into a top-30 firm. For him, the buy-in phase is the "opening gambit", where strategic direction is set out and then months may pass as the firm's key players are brought on board.

"You will always get a range of views, but you create a strategy broadly in line with what you want to achieve," he explains. "In my situation, we'd had a couple of poor financial years and partners, who were open to change, knew that it had to come."

Partners will go along with change "when forewarned and engaged",

Managing change



What would practice consultants say about how firms manage (or don't manage) change? Kevin Reed takes on the guise of the consultants he has spoken to over the years, to give you their (probable) thoughts...

"When you get change in practices, they're hot on processes, sometimes tech, but think less about people – in fact they forget them. And the vast majority of change initiatives don't work because they don't bring people with them."

"The next problem is the 'herding cats' issue. You can have five partners banging the drum, saying change is needed, but it will be so slow because it's difficult get the others on board. You'll see one partner derailing initiatives."

"When it comes to other partners and team members – it's the 'what's in it for me?' situation. So, good change management is understanding individual agendas and connect them to where you want the firm to head."

"You need a shared vision with key stakeholders, which is where it breaks down. There are so many concerns, 'can it work?', 'when will margins improve and we see a return?', 'how much investment is required'... Accountancy firms don't often have strong strategies, a strong compelling direction."

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says Gillman. "You are more likely to get strong views if things are foisted on them."

The future strategy is then broadened to outline what it involves in terms of change – but you must still allow contributions from a wide set of team members. The roadmap also acts as a backstop, a governance tool for the leadership. "It's not a straitjacket," says Gillman. "It doesn't mean you can't do things outside of it – but you have to justify far more if you want to do things outside [its remit]."

"It helps you build trust: there's this map and direction we're embarking on. You'll always look in and around it, but won't divert away from it."

Getting the message across

Once the direction is set at senior level, then further meetings with other staff are convened to spread the message. "You think about conveying what's positive for them, and communicate that. And with a forum of managers firing away questions, it's important as leaders to prepare for the questions you might be asked, to map out questions and concerns you might get."

Once the practice's team members understand its direction of travel, you must keep a broad cross-section involved in implementation of any new systems or processes, says Bobby Lane, head of outsourcing at Shelley Stock Hutter.

Working groups are key to implementations, representing all skill levels and departments. And practices must speed up their change, he believes: "We're in a transitional period within the profession at the moment. Look at cloud-based technology and the automation of processes, for example."

Lane foresees a "whole raft" of tech-savvy entrepreneurs emerging who don't know how to run a business or produce management information – they will rely far more heavily on advisers to plug the gaps. "They will be open to outsourcing to people with the requisite skills – and practices will have to be able to offer a wide range of services," he adds.

Practice leaders must consider the broader mix of skills they will require from their people going forward, and what platforms and systems they use to deliver their services.

John Brace concludes: "Change that represents a fundamental difference in the way things are done needs to be communicated in advance in order to get the team on board, otherwise you are doomed to failure."

"The change may be inevitable, but if you get the people together and explain the problem and the solution it should be possible to get acceptance."



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

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