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# All change

Four practices tell us about serving clients, managing their team and planning for a post-coronavirus world

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# Cash call

Practices are in a perfect storm. Mass client disruption means they're busier than ever, but a lack of cash could derail everything. And are your staff really working from home? We speak to four practitioners about their firms' efforts in steering clients – and themselves – through the impact of coronavirus



**Nikki Adams, CEO, Ad Valorem**

## **Q** How have you managed your staff? Communications and process, for example.

**A** We've long had a structure in the office for remote working. A pod system: a tiered system where you have client managers and then tiers under them to look after a portfolio of clients.

We've had die-hards in the office not wanting digital communication from home, but then there was no choice. It's not a technology issue, but a mindset thing – they just didn't want to.

We'd already had a dry run earlier in the month where we all worked from home. From that we ran an audit of what kit they had at home, what was needed and who might struggle. We've had to get five more screens and the one thing one thing we really hadn't considered was webcams.

Ultimately, nothing has changed from a process perspective. There are a few clients who use cheques but that will have to change.

We're getting home the point that we all need to be talking to clients as often as possible. We've been impressed with our team. They've also set up

WhatsApp groups to keep chatting to each other as Microsoft Teams crashed! They seem focused and proactive – not quite as distracted.



## **Q** What services have you provided clients, and what have you communicated to them more broadly?

**A** A communication was sent to all clients. It contained some practical advice and gave peace of mind that we're fully operational – alongside the immediate things for them to think about. We're in the process of phoning every single client, which will take us a bit more time to do. Most are amazed that we've bothered, and they're reassured that we'll get them through it. It's a huge opportunity to show true value. We all hear about providing advisory work, but you can't get that work unless you get the trust.

We've not charged clients specifically for support at this time. We'll probably make an





Nikki Adams, Ad Valorem

arrangement as to how it's paid down the line. Most of our clients pay us monthly by Direct Debit or standing order – because of this they're by definition pretty good with managing finance. A client that pays you on time is a good client.

We've had some clients very concerned and upset, and we're working with them.

**Q How do you see ongoing governance/people management/internal reporting within the practice as this way of working runs into weeks rather than days?**

**A** We've held counselling sessions with the team – how you handle difficult situations with clients and what to do with your own feelings. It's like conflict handling and stress management. We all have stress on top of the day job, we've all got different situations. In this process [managing partner] Nigel [Adams] and I found out that some staff were worried about their partners who are classed as key workers.

We're running fitness sessions via Zoom – different things on different days. Then Google Hangouts for coffee breaks.

It's fair to say that this situation has helped us create more structure in the day, and I think we'll keep that as we go forward. It has kickstarted some of the things we'd been trying to promote and think about.

Finally, we would say that we are set to work this way for as long as required. Everything's in place to do so.

**John Brace, managing director, Harwood Hutton**



**Q How did you manage your staff? Comms and process, for example.**

**A** In the last two weeks we have upgraded our IT systems to allow for greater remote working traffic. Our setup wasn't sufficient to have all people working remotely, so we upgraded our Citrix Netscaler so it would work.

We have now relocated all our staff to working at home and set various groups for video calls, both for work and just keeping in touch. On Friday we used Zoom for virtual pay day drinks, which normally would have been down the pub, and it's been really good to see people. We are using a mixture of WhatsApp, Slack and Zoom but are looking at Microsoft Teams as a more sophisticated application.

**Q What services have you provided clients, and what have you communicated to them more broadly?**

**A** We are doing regular mailouts on the government initiatives to help business, and speaking to clients to see how we can help on the Job Retention Scheme (CJRS), Business Loans Interruptions Scheme and VAT deferral.

We've had a lot of calls on furloughing. But client contact can vary. Some of our partners are hearing more from clients, while other clients aren't so bothered – so we're ringing up to check they're still around. One had already furloughed their staff: they'd worked it out themselves.

If clients don't want to talk to us, I can understand that they don't want to run up a cost

when they're least able to pay for it. This is a difficult situation as we can't afford to work for nothing. Some who pay us regularly have asked to reduce monthly payments – but then it reduces the work we do. It's a difficult tradeoff. The majority of clients should be OK, and we'll be flexible working with them as much as we can.

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John Brace, Harwood Hutton

**Q How do you see ongoing governance/people management/internal reporting within the practice progressing as this runs into weeks rather than days?**

**A** This is an interesting point, as management of remote staff is a new challenge for us. Obviously we have time sheets and budgets for work and we will be using these to scrutinise productivity to a greater extent than before.

At present, reporting is adequate for home working. I think the biggest concern is if this drags on, when it's all over, a number of people will prefer home working and not want to come back into the office. We may have to address this to see if we can accommodate it on an ongoing basis. This may work but it will have an impact on systems and premise needs.

**Q What do you think about people working from home in the long term? Will it cause issues?**

**A** We do like having people in the office, particularly when we employ part-timers. We like interacting with people. If we consider working from home on a long-term basis, I think it will change the culture of the firm.

The one bit that is difficult is that we have clients whose historic records are in part keep in hard copy. So getting that information to staff working remotely isn't quite so easy. We can scan very small quantities but large amounts of paperwork becomes a little bit tricky.

**Q How have you managed your staff? Comms and process, for example.**

**A** We were already well placed to manage – we've had team members working from home for at least the last five years. Our IT management was already remote, and we've been paperless since 2003.

Earlier in the day that the prime minister urged people to work from home, we had already taken the decision to close the office. The next morning we had an inaugural Zoom meeting to get us together and see how that would work. We sorted out the teething problems and now can see everyone.

We're also well-placed with Slack for team communication – our Outlook email inboxes are not for internal comms. We have various Slack channels, including client-related and our outsourcing work with AdvanceTrack: these filters work well.

We've always had a daily team 'huddle', which sets the tasks ahead for the day. This ongoing piece of workflow has now gone online via a Zoom call.

We have a relatively new system called Senta, through which we can manage workflow. It now has a jobline called Coronavirus to track client comms and tasks on this issue.

Peter [Disney, managing director] and I have said quick catchups should be requested by the team and get done quickly. Some staff aren't used to working from home and are more comfortable in the office, so we have a responsibility to make

sure they can complete their work but also understand how and when to switch off – they've asked 'when do I stop?'

**Q What services have you provided clients, and what have you communicated to them more broadly?**

**A** We really need to be there for our clients – not just from a technical support but human advice, as a sounding board. With that in mind we took an active role in calling them – daily with some clients. Not all involve compliance, more assurance that this will end and they need to keep on trying – don't give up and do your best to keep calm.

Clients have really responded positively. Some accountants we've heard of are not being proactive. We know we can't call all of our clients so we've pushed messages out through social media, LinkedIn, Mailchimp and direct emails.

Initially our efforts were 'pro bono', as it was more about directing clients and deciphering government messaging – but we told them that if they need help on a specific project they would have to pay: the work sustains them and billing sustains us. The vast majority have been great. A couple of clients said they couldn't afford us, but we put together a measured response and they've decided they want us to help them get through this.



Brendon Howlett, operations director, Wood and Disney





Brendon Howlett, Wood and Disney

**Q How do you see ongoing governance/people management/internal reporting within the practice progressing as we run into weeks rather than days?**

**A** There are going to be changes, and we've always welcomed change in our practice. But the big thing is going to be around regular communication: so our people or clients don't feel isolated. Perhaps an 'open screen' policy for both staff and clients permanently, but with less physical face-to-face. Should us or the client drive for an hour to catch up? Perhaps that will be the big change.

Our efforts recently and going forward should really help position ourselves as real business advisers.

**Q How did you manage your staff? Comms and process, for example.**

**A** At first it was a case of nudging people towards working from home. But this has to be balanced with keeping up workflow – how do we make sure things get done? There are slim margins and it's a balance keeping everyone busy. It was a case of keeping up momentum.

Early on we had people wanting to work from home. On 15 March I set up an informal WhatsApp group and invited everyone so we could get used to communicating and sharing as a team. I had new client meetings arranged, as you want to get the feel of a person through face-to-face meeting at the start. One of these took place on the 16th and the others all moved to telephone conversations. While I'm now relaxed and understanding about having people at home, it takes an adjustment and productivity has slowed down in the transition.

We've had a flexible approach to working from home, as the focus is on getting the work done. In some instances some won't do as much because they're not in the office but we have quite a few who have really mucked in and sorted things out for their colleagues – and they're the ones that will be in the practice longer-term.

From a technical perspective I'd say the biggest problem has been people trying to work without two screens, so some have taken their monitor home. Our internet-based phones are great but they require an extra cable running to the router to work from home.

**Q What services have you provided clients, and what have you communicated to them more broadly?**

**A** Going to my previous point on new clients, this approach marks a change in taking new ones on – but we have signed a client. In communicating to existing clients we've just tried to be very quick at sending information out and then having lots of conversations with them. We've found that, generally, the government's response has been pretty excellent – a load of business-focused support coming out.

In terms of understanding legislation, I have good informal relationships with people [ie. other experts] to swap information. Being CIMA-qualified, we are used to taking existing information and planning for the future while appreciating the gaps and what we don't know. I'd like to see our institute pushing our skills as management accountants but I am biased! These skills are to understand the data in front of you, what your client is telling you and their drivers for their business, then coming up with a simple plan. Help organise a direction of travel for them.

We pushed quite a bit of information out early to clients. I took part in a Zoom call with an HR professional to discuss the furloughing procedure and options. Even though the government's information is good, there was still some discussion required and daily clarifications coming out.



Bruce Burrowes, founder, Kingston Burrowes

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My patter with clients has come down to one of four things: on premises, check your rates; second, grants to manage staff and the potential 80% CJRS or the SEISS; third has been about delaying, so the VAT payment but still filing and income tax for July; fourth, CBILS [business lending] – having good records will be very important to accessing funding.

**Q How do you see ongoing governance/people management/internal reporting within the practice progressing as this runs into weeks rather than days?**

**A** We have accounts and tax as the fundamental teams. Our new office move into Cheam has been delayed but will help us work. And in three months I know we will be a better team and working together better.

# Webinar: weathering the storm

Alongside our day-to-day support for our accounting clients during what are very tough times, we ran a webinar to provide some advice and food-for-thought about leading a practice.

AdvanceTrack MD Vipul Sheth was joined by three experienced accounting experts: Clarity’s Aynsley Damery; Hannah Dawson of Futrli; and Xero’s Glen Foster. The topic was ‘Who Helps Leaders Through the Storm?’.

Our four experts looked to provide advice and share experiences about both the emotional and practical sides of leading during the coronavirus crisis – and hopefully impart wisdom that supports practitioners beyond the next few months.

“It’s really important that everyone supports each other through the coming weeks and months. I hope this video gives you some help



and support,” says Vipul. “Please reach out. You’ll be amazed at the kindness of friends, colleagues, family or even complete strangers. Stay safe.”

A recording of the Zoom-based webinar can be found at [www.AdvanceTrack.com/webinars](http://www.AdvanceTrack.com/webinars).



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