

Kidmans Partners gears for growth with Sage HandiSoft

Kidmans Partners Accountants and Advisors has been providing a wide range of customised business services to its clients for the last 10 years.

Its client-focused services offering, which includes business and tax compliance, wealth management, audit and assurance and strategic solutions services, are what sets it apart from traditional auditing and accounting practices.

Listed as one of the Business Review Weekly's (BRW) Top 100 Accounting Firms in Australia, the Melbourne-based practice has a team of 25 staff.

In 2005, Kidmans Partners underwent an office move and IT systems upgrade. As part of that upgrade, it decided to deploy a new practice management software solution that would streamline business processes and support future company growth.

Solution

After reviewing a wide range of accounting and practice management solutions on the market, Kidmans Partners decided to deploy Sage HandiSoft's practice management software.

According to Manish Sundarjee, Executive Director and Head of Strategic and Wealth Solutions Division of Kidmans Partners, "it was an obvious choice".

"No other solution could match the simplicity and ease of use of the Sage HandiSoft solutions," said Sundarjee.

"Sage HandiSoft software's best feature is its simplicity. That's what we really like about it. Anyone from first year students through partners will find it easy to use.

Five years on, Kidmans Partners is still using Sage HandiSoft's practice management solutions.

It currently uses Sage HandiSoft's Practice Manager software as well as the Document Manager, HandiTax, HandiLedger and Time + Billing modules.

Superior client service and business planning

According to Sundarjee, one of the Practice Manager software's best features is how it provides a centralised view of all client and critical business management information.

"Practice Manager has allowed us to centralise all the work we do for our accounting and tax clients," said Sundarjee.

"Our staff don't have to navigate across multiple screens and applications to view all the data relevant to one client. They can access it via a central console. This saves them time and enables them to spend more time on activity that will deliver greater value to their clients.

"It's really the hub of the office. We use it every day and depend on it to run our business effectively.

Sage HandiSoft's Document Manager integration capabilities means that every time a staff member sends an email to a client, a copy of the email is automatically saved in the client's file.

"Now anybody can access the latest client information via the console and respond to client enquiries informatively."

"One of the greatest challenges in a busy practice is maintaining visibility of everything that's going on. Practice Manager makes it simple to monitor our workflow by job, staff member or manager.

"It allows us to identify growth opportunities within our existing client base and improve our client service levels – we can see which clients we should be touching more often.

According to Sundarjee, it also helps them identify resource bottlenecks and budget more effectively.

"It's a great strategic tool that allows us to focus on tomorrow's work rather than today's work."

Ease of use and enhanced productivity

Sage HandiSoft's advanced reporting capabilities have also delivered productivity gains to the business.

"The software allows us to generate detailed reports such as Practice Management reports and Client Financial statements quickly and easily," said Sundarjee.

"Practice Management reports provide us with critical business information about staff productivity, debtor's aging balances, WIP aging, time sheet compliance, collections and recovery rates.

"Sage HandiSoft's software lets us generate these reports at the push of a button."

Likewise the HandiTax module has driven productivity in the business, enabling Kidmans Partners to create, lodge and track tax returns quickly and accurately.

"Using HandiTax, we can enter a client's details and complete and lodge their first basic return in just 10 minutes," said Sundarjee.

"The upgrade process was largely event free rapid and streamlined

A partnership approach

"When we first bought the Sage HandiSoft solution we had 10 users. We now have grown to 25 users. As our business has grown and changed, Sage have been there with the right solutions and support that our business requires.

"We regard Sage as a long-term strategic partner."

According to Sundarjee, Sage HandiSoft's support services have been excellent.

"Upgrades have been rapid and streamlined, they have been very responsive to our enquiries and able to resolve any issues we had efficiently."

