



# APS Case Studies

## Preston Epplatt & Co Ltd

**Interviewee** - Preston Epplatt – Managing Director

**Tel:** +64 6 878 8824

**Email:** [preston@pelaccountants.co.nz](mailto:preston@pelaccountants.co.nz)

### Key Quote

“Changing software systems can be extremely costly and time consuming. Our experience with APS was one with few surprises, it was timely and trouble free.

Support was excellent AND available when needed. I would have no hesitation in advising Xlon users to make the change to APS.”

## Section One General

When did your firm implement its APS Advance Practice Management system

1st July 2005

how many users do you have?

7

Which APS products have you taken out licences to use? (PM, Tax etc....)

We have installed Advance Practice Management, Advance Tax and we are also about to implement Advance Practice IQ. Will also use XPA (Xcede Professional Accounting) once Practice IQ is installed.

Who was your previous supplier and how long were you using that supplier's software for?

In my previous firm we were with Solution 6 – and had been involved with them for almost 15 years. So moving over to APS was a big change for us, particularly since I had been very involved with Sol6, being on their product development board, and also operating for them as a beta-test site in that practice. The products we had been using were Sol6 MAS, Tax – and Xlon for time recording.

From start to finish, how long did the meeting, testing and decision-making process take that saw you move over to APS?

APS had been knocking on my door for many moons while in that practice – but the perception about APS in earlier days was that they were 'expensive'. Back in those days Sol6 software was doing everything we wanted it to do for us. But when I came out of my old practice and set up this firm, back in 2002, I had worked out that APS was the better product to go with. However, in setting up a new firm, we went with Sol6 as we reasoned that sticking with who we knew would be the easiest way to get our new firm up and running. But it was only a short-term decision – once we were settled we were always going to sort our software out.

In many ways the MYOB merger with Sol6 was the final straw for us – and so we made the decision to move over to APS. Also when we ran the numbers with Shane Compton, it turned out that it wasn't nearly as costly as we had thought it would be. My perception was previously that APS was for larger practices based on cost – I was pleasantly surprised. Although the onsite consulting rate of \$240 per hour was high for a provincial practice, we were more than happy with the job our APS consultant did.

Was your decision to move over to APS made on gut-feel, or was it more scientific than that? Please explain how you went about making your decision.... (e.g. team approach: IT manager, IT Partner, Work Group etc...)

Certainly – having been through a large number of conversions and upgrades with Sol6 over the years I was worried – and this is the reason we delayed going with APS when we set up the new practice. As part of the conversion, we were going to be taking time recording data out of Xlon – a database we had had problems with and I was particularly worried about this aspect. I wasn't sure how it could be done effectively without losing data.

## Section Two Installation / Implementation

**Having been a Sol 6 user for so many years, were you at worried about the installation and implementation of a new system? How did you view this before you undertook the process?**

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**In practice, how smooth was the installation and implementation of your new APS Advance system?**

It really was very impressive, starting off with the pre-installation planning phase. The documentation arrived and I was surprised – a 'big' document pointed to a 'big' and very daunting job. But our APS consultant, Jodi Tomlin, talked to us on the phone via a series of weekly discussions before the implementation and we ran through the document as a sort of checklist. On our own it would have been difficult – doing it in conjunction with Jodi made it easy. We were able to have a staged discussion in terms of how we would have the system set up – and this was a real advantage – we were guided through the whole process, step by step.

**Conversion of practice data from your old system to your new one was of course going to be one of the major issues in your implementation – can you tell me how the APS consultant performed in this regard?**

Well, first off we sent a copy of the Xlon database to Jodi – she initially had some concerns over passwords – but she managed to extract all data (in fact we had a 99.9% success rate). I was amazed – as I said earlier I was expecting they wouldn't be able to do it all to start with. Although APS had assured me there would be no issues, I was sceptical and so did some checking with other APS clients – and they reassured me. I still thought that 80% would be as good as we would get in terms of conversion.

Subsequently the conversion of data took place in Auckland – we didn't need to do anything until the database was sent back to us for checking. We reviewed that data and the credibility was there – a few standard checks and tests showed quite clearly that the data was clean.

From there we set the date for Jodi to run the installation. She arrived on a Sunday afternoon and installed the software including the client database and everything else as required. We had a staff training session on Monday morning at 8.30am – and the staff were doing their diary timesheets the very same day – it was great!

**A new system means that 'change' is forced upon team members – how did your team react to the new system and how quickly did they pick up the new system?**

Two of staff have been with me for over 30 years and had been using Sol6 for most of that time – so they were not looking forward to change and were quite negative.

But I have to say that Jodi handled this in the training sessions very well – her attitude and approach helped pacify these people and they quickly worked out that there was some great functionality in Advance they hadn't had before. Thereafter the reticence dropped away – on the very first day. We had Jodi on site for a week and this made the whole process of change so much easier for all members of our team. It would be fair to say that at least one of those staff still does not like the diary system. But that is more about her resistance to change rather than about the software.

First we ran with the Time & Fees and then the Tax product – so Jodi trained us up on Advance PM and, having done that, she ran staff training on Advance Tax.

All in all it was a great week. Staff queries on time recording were answered straight off and then we could just get on with our day to day jobs.

**Now that you have been using APS products for some time, has the combination of product and service met your expectations? If so, please tell me about it.....**

As a new APS client, we needed to use the support helpdesk quite a lot in the early days – and it was much easier than using a manual. The helpdesk team knew we were a new user and the process of getting a result on any issues we had was great – we were very pleased.

We struggled through the first month roll-over in PM to a degree – but we received excellent support from the help-desk, a real plus. Literally the only negative comment we would have about PM relates to the manual – it could do with a bit of work to give new users a simple step by step approach to month-end procedures.

In Tax, we have had a couple of small things that we found difficult to start with. But these were mainly down to us being a new user. The Tax software works well for us even though some of our staff have had more to come to terms with in terms of change. The software has generally been robust – we've had no problems.

## Section Three APS Team

APS sales people and consultants pride themselves on their ability to listen to their clients regarding business needs and business aims and they are committed to then working closely with clients to meet and achieve them. Tell us about the APS approach from your perspective.

After month two I wrote to APS and pointed out how I thought the process had gone. I had feedback from people on the APS team in a matter of days which was great. Also, at the Annual Conference in November in Fiji, I was able to talk to those people face-to-face and contribute to the enhancement process.

As I mentioned earlier, I had been involved at Sol6 for many years in the enhancement process and user groups – but APS has showed me and my colleagues very quickly that its people listen and take on board clients' comments and views.

## Section Four Product

### Functionality

How does the Advance suite compare to your previous product in terms of functionality?

I am still learning about how far I can stretch the Advance products – but already I am finding some great tools. There is a big learning curve but we relish that – to get the most out of the software for the benefit of our practice. The Annual Conference was a great opportunity to talk to other practitioners about how to get the best from the software. Long-term APS users were keen to give ideas and knowledge to new users which was excellent.

### Ease-of-use testing

Is the Advance suite easier or more difficult to use than your old system – in terms of things such as flexibility, easy access to information, comprehensive reporting and so on.

We have just employed a new staff member – we showed her how to record time just once on her first day, then no problems, she was able to do it on her own. The sequences are very logical, so on that basis it is very easy from a user-perspective.

### Future Development

What would you like to see APS add to its product set in its next releases of Advance that will assist your business? What does it need to do to stay ahead of its competitors?

As far as PM and Tax are concerned, I am keen to see the process of billing / fees enhancements built in. The fee process currently has reduced our time required by 2/3rds in comparison to where we were with Xlon. My own time from an administration perspective is about the same.