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McKenzies Group automate costly administration with Advance BPA

Client Case Study:
McKenzies Group

BUSINESS CHALLENGE

Suffering from the common pains of rapid commercial expansion, the McKenzies Group were looking for a new Practice Management solution that harboured sophisticated Business Process Automation capabilities. McKenzies were specifically looking to automate key business processes such as invoicing to remove partners from repetitive administration.

McKenzies Chartered Accountants was established in 1977 and has grown to become a forward-thinking, modern firm with an enviable reputation for assisting a wide range of individual, commercial and professional interests, including many local charities and clubs in Oxted, Surrey and across the South East.

ABOUT APS

As a people led service organisation, our main focus is to identify what each client wants to achieve in their business and work with a range of APS and third party software applications to help the achievement of those goals. We make promises, we ask for the trust of clients and, importantly, we deliver.

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In 1996 McKenzies became the first firm of Chartered Accountants located in the Surrey TEC area to gain the prestigious Investors in People award, which is an indicator of its commitment to both staff and clients.

MCKENZIES AND ITS INITIAL INTEREST IN ADVANCE BPA

Being a leading provider of professional services, Mckenzies has invested heavily in information technology to ensure that its clients receive the highest level of service. As part of the group's investment, McKenzies selected the powerful practice management solution Advance PM and it was this solution that first brought TaskCentre to their attention. This was highlighted by Greg Mackey, Software Consultant for McKenzies when he said, "At the time, we were evaluating the practice management solution, Advance PM and one of its key modules called Advance BPA. It later came to light that this module is actually TaskCentre rebranded and is made available to all companies running Advance PM through an OEM agreement between Orbis Software and Advanced Professional Solutions. This was our first exposure to the product."

MCKENZIES AND ITS USE OF ADVANCE BPA FOR FEE INVOICE PROCESSING

Historically, very little attention has been paid to the cost of processing Invoices; primarily because of the importance of this manual employee process and the fact that this function is seen by management as a cash generating activity. Yet this one process alone is the most susceptible to errors, time lags and of course heavy, repetitive workloads that strangle cash flow within a company."

Greg recognised the opportunities that Advance BPA automation capabilities presented for streamlining this function and this was highlighted when he said, "By mapping out the fee earning process, we could see that Advance BPA would remove a considerable amount of administrative intervention. Our employees would routinely create accounts, conduct typing narration, writing off fees against time spent, approve invoices and print associated documents. All these activities could be streamlined using Advance BPA."

To be more specific, Mckenzies are using Advance BPA to monitor the different stages of fee generation and to notify key personnel, via e-mail, when their input is required. The benefits of this simplistic automated process were highlighted by Greg, "Just by using Advance BPA to proactively monitor and notify on the key stages of the fee generation process, we have dramatically increased the speed in which fees can be raised. Furthermore, members of staff cite greater insight and awareness of what is happening with a given account as a major benefit."

This is a perfect example of how the use of just a few Advance BPA tools can dramatically

improve the way a business operates and performs. Another interesting and valuable business process that McKenzies have automated is that of conditional data validation.

In certain situations, McKenzies are legally required to record very specific information about a given client if they match certain and often complex criteria. This typically goes far beyond the scope of most applications, so McKenzies are using Advance BPA to monitor and notify on data fields that have not been completed.

The benefits of automating McKenzies data validation process were stressed by Greg when he said, "The result of using Advance BPA to automate this heavy, repetitive administrative process has been a higher level of detail being collected concerning client records. All businesses these days understand the importance of having full and accurate information to hand but it is absolutely critical for professional organisations such as ours."

McKenzies have also automated a number of other business processes such as the creation and distribution of work-in-progress reports, the monitoring and notification on bills raised that do not attain or exceed predetermined profit (or recovery) levels, the examination of and notification on agreements in the system that are approaching their expiry date and the delivery of alerts to partners regarding proposed agreements that require chasing. However, aside from all of these examples, one of the other key business processes McKenzies are using Advance BPA to automate is that of final fee processing.

Mckenzies historically used valuable employee time to manually create and send invoices but this is no longer the case as, Greg highlighted, "We used Advance BPA Document Automation capabilities extensively. For example, we now receive monthly reports on what expected payments are to be received and which client invoices will be automatically created. Advance BPA will then automatically generate and send those invoices."

The primary gain this has brought McKenzies is a significant improvement in company cash flow and fixed fee management.

MCKENZIES AND ITS FUTURE PLANS FOR THE WIDER PRACTICE USE OF ADVANCE BPA

McKenzies have a number of future plans for Advance BPA but in the immediate future it will be focusing on using it to automatically handle and route inbound e-mails, "We have identified a number of opportunities to reduce the costly, repetitive activity of forwarding common inbound e-mails to the relevant employee. We will then extend this automated process by enabling stakeholders to add keywords to the subject line or body of the e-mail so that they can trigger an automated process."

When Greg was asked to give a final comment on McKenzies experience of Advance BPA to date he said, "Advance BPA has delivered a number of financial benefits to the company and is an excellent 'goto' solution when looking to implement or enforce business rules and procedures."

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ABOUT ADVANCED PROFESSIONAL SOLUTIONS

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We make promises, we ask for the trust of clients and, importantly, we deliver.

We do this day-in, day-out and it's what makes us the accountable organisation we are - both in terms of our people, our level of service and our software. Once experienced, our accountability also breeds confidence and that's what makes us very different from other suppliers. It also provides a pointer to why we have gained such a large market share in the professional services sector.

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