



APS Case Studies

Pitcher Partners

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Involvement in selection process

As Director of Operations I was part of the selection team which also included one Partner and our Director of Finance.

Key Quote

“We have installed Advance Practice Management, a new general ledger system and Advance Practice IQ all in three months. We consolidated five client databases, converted all matter data, trained all staff and did not lose one day of processing along the way.

Three months after implementation – billings are up, chargeable time is up. All our problems are small ones.”

Section One General

When did your firm implement its APS Advance Practice Management system?

We implemented APS Advance Enterprise edition on 30th June 2003 for a total of 350 users.

Which APS products have you taken out licences to use?

We have taken on Advance Practice Management and Practice IQ.

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

Before the switch, we were with Solution6 for 12+ years

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

The whole process took 24 months in total. Implementation took four months from signing the contract to "go-live"

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.

It was more scientific than that – we defined our requirements, and tested APS's systems through thorough demonstrations and detailed discussions with the APS team. We then installed a sample and began testing.

APS prides itself on its ability to listen to its customers regarding their business needs and business aims and its commitment to then work closely with customers to meet and achieve them. Tell us about the APS approach from your perspective.

Fiona Harding has handled our implementation to date - they are very accommodating and have been able to meet most of our needs. They tell us the truth even if it is not what we wish to hear! They generally have a can do attitude that wills them to find a way to meet our needs rather than discounting them as "undoable".

Section Two Product

Functionality Testing

Looking at APS from a product perspective, what were the most important factors from a functionality point-of-view that were seen as critical to your business – the things that APS had to have if it was to be considered as a your practice management and tax preparation software provider?

The most important factors from a functionality point-of-view for us were as follows:

- a modern software platform
- a solid development path
- flexibility to meet our unique needs
- easy to use interfaces

And, ultimately, the three things that helped us come to a final decision on selecting APS were:

- development path record
- the APS billings process
- list functionality

Did you feel that APS was ahead of its competitors in terms of its functionality and how did you verify the fact?

Advance's functionality is equal to its competitors (Viztopia and CMS Open) but its screen flow as demonstrated was much more in tune with our way of thinking.

How long did you pilot and test the Advance product set for functionality – and how many people were involved? Was the APS team accommodating in this process or did your APS contacts press you to make an early decision?

We tested Advance thoroughly for 3 months – our team was made up of one Partner, the Director of Finance and the Director of Operations. The APS team was very accommodating throughout the process.

Ease-of-use testing

From a functionality point of view you have told us why you moved to APS. Ease-of-use is also important: how did you make sure that Advance is easy-to-use from a practitioners' perspective?

We made sure by testing the products. The demonstrations we received also satisfied us that Advance would be easy to use.

Was testing 'ease-of-use' an important part of your testing process? If so, how did you test the product set for ease of use?

Yes it was. Our test was to start using Advance without the manual to give us an idea about how easy it would be for our team to pick up and use. Advance passed that test.

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?

We would like to see functionality that links APS to any other system, examples being Caseware, BGL simple Super, AXYS, and Praemium.

Section Three Corporate Situation

Were the following factors important to you in determining if APS was the right provider for your firm to go with:-

The fact that APS is a profitable business? APS prides itself on the fact that it has posted a profit every year since inception in 1991

Yes, this was important to us. A software house needs profits to reinvest into the continuing development of their products

The fact that the Advance product set traces its lineage and development path directly to its first release in 1994 there has been no deviation from the product roadmap – merely incremental annual upgrades to the product. This has meant that customers have not had to waste time and money implementing new systems on an intermittent basis.

Yes, this was also important to us. The continuity shows that the developers understand technology and where it is heading. It also shows they understand the workings of an accounting practice.

What other corporate stability factors would you recommend that firms should consider when choosing a Practice Management system supplier?

Any supplier needs to understand the current issues in our business and show a willingness to provide solutions in a short timeframe. APS has this capability and we feel that we have a voice in their development process.