



APS Case Studies

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Key Quote

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Section One General

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

July 1999

Which edition did your firm sign up for – a) Professional or b) Enterprise Professional Edition.

How many users do you have?

We have 35 users

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

Advance Practice Management, Tax, and PA (Professional Accounting).

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

Solution 6 – we had used them for 10 to 12 years

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

It all took 3 months in total – we went to Sydney and compared APS to Sol6 to CA Systems, and to Cee Data in the course of a number of half day sessions.

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...)

Our decision was more scientific. The Windows platform and the architecture of the product were key elements affecting our decision.

Now that you have been using APS products for 3 years, has the product and service met your expectations? If so, please tell me about it.

Yes. The support is as good as you will get in any software application and the product works well for us.

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.

This is true. The team listens and is interested in what we have to say – they don't always agree with my ideas but at least they always tell me why!

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?

3 factors were most important for us – firstly, improved billing, secondly, open architecture; and, thirdly, financial statement presentation. These were the three initial key drivers that saw us choose APS.

Did you feel that APS was ahead of its competitors in terms of its functionality and how did you verify the fact? (e.g. pilot / product testing methodology)

We did feel this was the case. I went to Sydney and spent half a day in each supplier's offices, having a full run through of all functionality that CA systems, Sol6 and Cee Data had to offer. APS came out on top.

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 did not run a pilot – the functionality comparisons I made when in Sydney were enough to convince me to choose APS. In fact I don't think APS was offering a full 'pilot' back in 1999.

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Did testing the Advance product set provide any positive surprises in terms of embedded functionality that you did not know about..... functionality that could help your business in a way that a PM system had not previously?

Not really. My testing was reasonably exhaustive – I knew what I was going to get.

Having said that, I do believe that some improvements can be made. For example, PA's modification of templates is too technical for many users – in fact it's probably the hardest report writer I have come across. It's complicated but the pay-off is that it gives us extra functionality. Also, I have always said and I still maintain that PM reporting is Advance's weakest point. APS has addressed this by saying 'buy our PIQ product' – but this is a financial barrier for a smaller firm user. These are not criticisms, more observations for APS to consider. I get a number of calls from other firms who are considering buying APS – and I always mention these points. But at the same time I always underline the value of the product and the fact that our firm is a happy customer.

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?

Ease-of-use is fine but Fees are a little fickle in billing – everything else is very user-friendly. Interim Fees need an overhaul – some of the processes are a little problematic. Again, these are not criticisms – just things that could be worked on.

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?

We had no problems when testing the product – and we have found that our new accountants find it easy to pick up.

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?

One issue I have discussed with Ross Wheatland – I would like to see a great deal more interaction between the Tax product and forms that we supply to our clients (like the NZ Workpapers product, an XML file for clients to fill in and email back to you) – this is more relevant to tax than business services. One size does not fit all for business services in the same way. If a Workpapers style product could be built to interface into PA we would save a huge amount of time as we could extract data direct from a client without it having to be typed again into PA. Clients would respond positively to this also I think as it would reduce our time requirement.

As far as the Tax product is concerned, (the bane of our lives is the paperwork we receive from the tax office and finding an effective way of dealing with it) as yet APS has not yet come up with a practical solution to help deal with this e.g. integration of information within the tax system e.g. PAYG instalments

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

It is an important principle – but when we signed up in 1999, this point was not really being underlined.

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, it's nice but not particularly critical – more critical to me is what the product does here and now. It does what we want it to do which is important.

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

The 'people' thing – the fact that many APS people have been with the company since the start makes a real difference; and here I mean the development team as well as the support team.