



Case Study – HLB Mann Judd

Name of Firm: HLB Mann Judd
Name: Carolyn Patman
Title: Director
Phone: +61 2 9020 0400
Website: www.hlb.com.au



General

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

It was back in March 2004 that we first installed APS in the shape of Advance Practice Management (PM) - I was involved in the original selection and decision-making process. Prior to APS we had been with Solution 6 for 10 or more years.

APS was relatively new in those days – but it was their approach that caught our attention; they were very clear about how they were going to develop their product from the ground up, whereas MYOB / Sol6 always seemed to be buying a product from elsewhere.

Coupled with this we had had enough of Sol6 support. By comparison APS have been great and the annual conference provides another dimension altogether. Not only do we get to spend time with our day-to-day contacts, we also meet the software developers – and other users – it's a bit like a big family. We've been really happy with this conference concept and it gives us the ability to talk to people at all levels.

Which APS products have you taken out licences to use?

As I said, we started off with PM in 2004 and we added Advance Tax and XPA (Xcede Professional Accounting) in 2006. We've had PIQ (Business Intelligence) pretty much from the word go – and it's great for reporting and is so powerful.

Since then we've also taken on Desktop Super (SMSF Admin) and BPA (Business Process Automation - the 'alerts' functionality) as well as iManage (Document Management) which is an excellent solution for a firm of our size with 160+ users – including the web version of the product.

iManage has meant a big change in terms of the way we file. It's now so much easier to locate files and because it is integrated into PM you don't even necessarily need to know what someone has called a file! Having this product in place has helped us to really think through how we manage and store our information and data.

Other products in the pipeline include Digital Imaging which we're due to implement in 2011 for Tax Assessments – it's going to enhance and systematise our process immeasurably for this type of work.

Finally, we've three further big ticket items in the works. Firstly there is Resource Planning (RP) which we believe will help us plan for and resource the work we do for our audit and larger business services clients. It is a very exciting piece of software and we're currently talking direct with APS developers to make sure it is configured to work the way we do.

The next big ticket item is Advance CRM, we have a full time Business Development Manager and while the marketing functionality in CRM will be helpful it is more the 'prospect' management and 'opportunity' management functionality that helps track additional and new work that looks to be the big leap forward.

Finally, we hope to have the new Workpaper Management software implemented by 1 July. This will help us streamline our processes and move toward a much-less-paper office.

In the second half of 2011, we'll also be looking at switching to the Advance Corporate Register product for our corporate secretarial work.

So, as a firm we are pretty much installed with all APS's products.

The Integrated Advance Suite

Can you tell me what the integrated Advance suite means to HLB Mann Judd Sydney?

It means an awful lot in a practical sense. For us the Advance suite is not just a database – it's an information centre. An information centre about our clients, about the relationships between client entities and groups, their bankers their lawyers, the related documents, letters and emails to and from them and so on; it links literally everything we need to know about a client and his or her activities in an organised way via the Central Console.

The Central Console is 'central' because, from it, our users can access any element of their clients' affairs. And as it's fully integrated it also means that users can keep a single set of contact details for a client, and any change made to those contact details will be updated across the suite.

Can you give me an example of how Advance's integrated functionality is benefitting the firm in terms of process streamlining, time savings and productivity?

There are lots of instances I can think of where it makes our lives easier. For example it allows us, at a glance, to see a client group and be able to report on that group, drawing information from all APS applications.

The flexibility of the product and the info held within it enables us to report on so much more than we could in the past - both for our own business and for client's businesses.

As a consequence of the ease-of-access, more and more of our fee-earners are taking advantage of the applications within Advance.

Product Updates

Every year APS invests in delivering a number of major upgrades and running annual updates.

APS very much lives up to their update promises. The annual Advance Tax upgrade is becoming smoother and smoother every year.



Of course, sometimes one thinks 'if it ain't broke don't fix it' because an update or upgrade comes when we are happy with an application as it is. However, you do have to keep moving it forward every year. Because as Microsoft's platform and tools develop, so too must APS. Their team is very good at getting the best out of new Microsoft tools as they become available.

APS People

How have the people you work with at APS helped ensure you get the best out of the integrated Advance suite – are they accessible and helpful to your team in practical terms?

Definitely so, they are very easy to talk to about whatever it is you are trying to achieve with the software. They'll be honest about whether they think 'a' or 'b' will work. They're also good at taking on ideas from us and adding our functional 'wants' into their update list. We're more than happy with the experience.

Sometimes, though, they are so busy it can be hard to get someone out to make a change you want 'now'. This is really a result of how successful the APS business has become.

Functionality

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

What we have now is so different it's not really fair to compare. The fact that it's all integrated is key and the fact that we can get our hands on all the client or practice information we require from a single window, that makes a real difference to our firm.

Our people now know that everything they need to access on their clients' affairs is in there and it is accessible.

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?

We would like to see a client portal. Of course, privacy issues need to be very clear but we think it's the next logical step.

I'd also like to be able to get our hands on the APS iPhone and Blackberry integration – as well as coming to a point where we can use iPads and other devices to access all our systems via the internet.

The APS Roadmap has been a real guiding light for us – you just know that if it's in the Roadmap, it will happen. It enables us to look into the future which helps us plan for the future.

Sometimes some apps take longer to come to life, sometimes quicker than planned – but you'll always have an honest discussion with APS about what is coming and when.

Summing up

Do you have any final words that sum up how you feel about APS, its team and its software?

They've always been very approachable, very good with their ideas. As clients we are all reliant on their team to guide us on how to use the software suite to best effect – and so this year's annual conference in Auckland was a great step forward – focussing on best practice systems and processes and how Advance can facilitate those best practice methods. It was all very timely for all those users like us who want to get the most out of all elements of the Advance suite.

