



APS Case Studies

Byers & Co Ltd

Interviewee - Peter Byers - Partner

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Background to selecting APS:

I was actually one of APS's original clients back in 1991. Our firm was a part of the group of 78 firms who were Hartley users – when Hartley was taken over we assisted Shane Compton and others to set up APS to support the Hartley product. So, when the first version of Advance was launched in '94 we were consequently among the very first firms to have the system installed.

Section One General

When did your firm implement its APS Advance Practice Management system 1994, at time of its first release.

Which edition does your firm use? – a) Professional or b) Enterprise
Advance Professional

How many users do you have?
We have 12 Users

Which APS products have you taken out licences to use?
We use Advance Practice Management, Tax Management and Xcede Professional Accounting – and we have recently taken on Practice IQ as well.

APS makes much of its commitment to delivering regular upgrades to the Advance product-suite – you have been an APS Advance user from its first incarnation - how has APS performed in this area?
I have to give APS 9 out of 10 for performance in this area. Not only do the upgrades occur on a regular basis but also the upgrade team members are very well trained – and they interact well with our office team. We trust them with all our data and the personal relationships we hold, in particular with Jodi Tomlin, are very strong.

From a practice perspective, what are the key benefits of the Advance suite?
a) We see the three key benefits of Advance as being a stable platform
b) regular upgrades
c) a good helpdesk. We seldom call the helpdesk but when we do they are very responsive!

I understand that you have recently taken on Practice IQ, the reporting element of the Advance suite.... why did you take it on and how do you expect it to help Byers & Co?
We actually took it on because more and more I am conducting business away from the office – on site with clients. So consequently I need to be able to manage the firm from a distance – and Practice IQ allows me to do that. I work out what reports I need and PIQ lets me draw out of Advance the information I need.

You have been using APS software for 10 years so you have a great deal of knowledge of the overall product and service package offered. How has the package of product and service stacked up over those years?
Well, if you are trying to compare APS with other suppliers there is no comparison – but that could be taken as a backhanded compliment! Ultimately, the product has enabled us to work the way we like to work – we can add our own touches to what it offers – and we have a great relationship with the team. In particular Jodi Tomlin and Sue Le Grange are great to work with. I mentioned Jodi earlier – but Sue rates a mention too because if we ever have any issues that need attention she is always on hand to sort them out.

APS prides itself on its ability to listen to its clients regarding their business needs and business aims and is committed to then work closely with clients to meet and achieve them. Tell us about this APS approach from your perspective.
Yes – it does work like this – the APS team works very hard to deliver on this basis. What also helps them is that they have great relationships with companies such as Kinetics who are also very competent, responsive and helpful people. It's these kind of relationships with third parties that gives APS its edge.

Section Two Product

Functional

Looking at Advance from a product perspective, what are the most important elements of the suite from a functionality point-of-view for your practice?

Firstly, the fact that with Advance we are able to design our own charts of accounts;

Secondly, the fixed asset schedule formatting is great within Advance;

Thirdly, APS seems to be much more flexible than its competitors when it comes to updating the system for legislative change – that's really important to us from a client perspective.

For your firm, what are the critical things that the Advance software development team needs to focus on in the coming 2 years to ensure the software stays at the cutting edge and ahead of its competitors? i.e. What do you want to be able to use Advance for that it currently does not cater for?

We would like to see the team concentrate on developing the following functionality:

- a) a KPI setting and measurement module for value pricing – we don't use timesheets;
- b) reporting on non-financial benchmarks – e.g. job turnaround times on client matters
- c) GST reporting functionality
- d) a CRM system that can log and measure KPIs and new work opportunities on current clients

Ease-of-use

Ease-of-use is also important: do you find that Advance is easy-to-use from a practitioners' perspective? Is it easy to train new team members to use the software?

I rate Advance 9 out of 10 when it comes to ease-of-use. No other supplier comes close.

Section Three Corporate Situation

Are the following factors important to you in determining if APS is the right provider to stay 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

I don't want to deal with anyone who is not profitable – that creates a threat for my business. APS is not cheap, so I would expect them to be profitable! We feel we pay top dollar for what we receive.

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, very much so – non-APS users may have found themselves having to change systems once or twice in the past 10 years. On Advance, we have not had to – which means we have a stable practice too.

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

I do have some issues with the merry-go-round of mergers of the past few years – but I am happy that APS has gone in with Reckon – the move will allow them to build for the future.