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**Case Study**  
**Hartmann-Cox Chartered**  
**Accountants**

Hartmann-Cox Chartered Accountants increases capacity planning by 15% due to CCH iFirm



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**Benefits**

- **15%** capacity planning increase
- **12%** annual revenue growth
- **100%** client retention

*“CCH iFirm is integral to our business and has delivered years of considerable capacity planning benefits. During the pandemic, we added 15% to our annual workload without putting on more staff, retaining 100% of the new clients, and producing 12% revenue growth.”*

**Troy Johnson - Partner, Hartmann-Cox Chartered Accountants**

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Practice automation is easing capacity planning challenges for Hartmann-Cox Chartered Accountants. This is helping the firm manage ongoing compliance and new advisory revenue streams – while maintaining superior client service levels.

**Automating workflows inspires growth**

Hartmann-Cox has embraced the CCH iFirm eco-system for many years now, enjoying the benefits of a unified cloud platform with practice management, client accounting, and compliance tools that has helped it grow its advisory and compliance services.

*“In moving to the cloud with CCH iFirm, not only have we calculated a minimum reduction of 50% of our technology overheads and retiring hardware we have had to own and manage, the efficiency and productivity benefits has continued to deliver positive results for us.”*

## Company Details

**Name:** Hartmann-Cox  
Chartered Accountants  
**Web:** hartmanncox.com.au  
**Size:** 15 Employees

## Solutions

- CCH iFirm Practice Manager, Client Portal, Client Accounting, CGT Reporter, Tax, Intranet
- CCH iQ, CCH iQ Client Match
- CCH iKnow
- CCH Learning
- CCH Document Manager

*“There is less manual work to do with compliance offerings and this has increased our efficiency and means we have more time and energy to focus on business advisory. Clients are increasingly looking to us for financial advice and we see our role as their most trusted adviser only becoming more important.”*

**Troy Johnson - Partner, Hartmann-Cox Chartered Accountants**

Being in the cloud with CCH iFirm and recording every meaningful point of contact with clients put the Hartmann-Cox team in a strong position as it moved to a remote working environment at the onset of the global pandemic. The automated workflows in CCH iFirm – and integration with value-added tools such as CCH iQ – meant a seamless transition to ‘business as usual’ and generated 12% growth in revenue during the pandemic.

## Delivering on maximum efficiency

With the transparency of CCH iFirm, the team at Hartmann-Cox can easily find any compliance or advisory work, match supporting documents, review conversation trails – and respond knowledgeably to client queries.

***“The efficiency that CCH iFirm provides us makes us look so good,” says Troy Johnson, partner at Hartmann-Cox Chartered Accountants. And if I’m out with a client, every working paper is securely on my laptop”.***

Clients can do elements of self-service via the CCH iFirm Client Portal. And the advent of secure e-signing technologies – integrated with CCH iFirm – has also proven a boon to both practice and client use of time.

## Creating new revenue streams

CCH iFirm not only helps create a “work from anywhere” environment, it also supports new revenue streams. Combined with other CCH tools, like CCH iQ, it showcased the firm’s ability to respond to its small business client base during the early days of COVID. For Troy, it meant “within days of each of the constant changes to the JobKeeper Payments legislation, CCH iQ Client Match would push a list of Wolters Kluwer resources and summaries to subscribers. We’d support this with advice and send tailored insights to clients on the impact on their businesses.”

Troy tributes CCH iFirm Practice Manager with its advanced capacity planning capability to help the firm manage its workload associated with the Government’s JobKeeper Payments program. By relying on heavily automated, specialist accounting workflows, fulfilling a flat rate advisory offer for business owners was easy.

***“With the efficiencies and productivity gains from CCH iFirm Practice Manager, we were able to take on the additional work and clients appreciated how quickly we could respond to them. We also provided these excellent services for a flat fee. Clients really liked that. And, because of the efficiencies of CCH iFirm and its supporting tools we could offer this fixed price service.***

## Planning for the future

“When we first implemented CCH iFirm, we had no one working from home. We can now confidently offer flexible work arrangements - vital in this tough, supply-driven job market,” concluded Troy.

## Find out more about CCH iFirm

One unified platform for your firm management and compliance needs.

**Visit:** [www.cchifirm.com.au](http://www.cchifirm.com.au)  
**Email:** [au-support@wolterskluwer.com](mailto:au-support@wolterskluwer.com)