



Case study

CCH Central suite equips Moore Stephens South for the digital age

From offices in Guildford, Salisbury, Southampton, Chichester and Newport on the Isle of Wight, Moore Stephens (South) LLP serves around 4,000 clients. It is a member of Moore Stephens International Limited, the global accountancy and consultancy network.

Key benefits for Moore Stephens South



A single, integrated suite of software supports efficient operations



All software, whenever added, draws on the single centralised client database



Support for major compliance challenges, including the GDPR and Making Tax Digital

The right connections

Moore Stephens South is a long-time user of the CCH Central suite from Wolters Kluwer. The compliance software has supported the business since 2001, together with software for practice management, document management and audit automation.

IT Manager Julie Sinsbury is responsible for IT services in this region. She outlines how using the centralised client database - CCH Central - at the heart of the suite is fundamental to working efficiently, "Integration means that everything we know about our clients is easily accessible in one location, rather than having to dip into separate applications. If one of the team updates client data while preparing accounts, it's then available across the entire suite of applications."

The firm's marketing data is automatically updated, too, which makes it easier to mine data and send targeted communications to clients.

CCH Central interfaces to all the individual programs in the suite, creating a consistent front end, with homepages collating information from the different applications onto a single screen. Julie says, "We've set up standard role-driven homepages. So, the partners' screen will include a list of bills that need approval, for example, whereas everyone will see timesheet information, including leave taken and remaining."

Individual applications also interconnect to eliminate multiple data entry: CCH Accounts Production and CCH Personal Tax connect for business profits, while copies of tax returns filed online are automatically saved in CCH Document Management.

As an IT manager, Julie enjoys the flexibility to adapt the software through application program interfaces (APIs), "Our strategy is to ensure reliable and efficient day-to-day working while keeping ahead of future needs and innovation."

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Meeting General Data Protection Regulation data requests

CCH Document Management was one of the later products in the CCH Central suite to be implemented within the firm. Describing the benefits of adopting paperless processes, Julie says, "We can send links to colleagues that take them directly to documents stored in the database." A pop-up added into Microsoft Outlook prompts users to send and file emails in CCH Document Management with a single click.

Julie comments, "The introduction of the GDPR has heightened the importance of having client information readily yet securely accessible. Should we receive a data request from a client, CCH Central will pull together information from our compliance software and CCH Document Management, enabling us to respond promptly. It's a real comfort to know that it takes any guesswork out of the equation."

As well as client data, business and administrative data is also stored on CCH Document Management, giving employees secure access to documents such as their payslips in softcopy form.

The next compliance challenge – Making Tax Digital

In the drive to enhance collaboration with clients while maintaining tight security, Julie is currently implementing CCH OneClick, a secure set of cloud tools to support messaging, authorisation and document sharing.

She says, "Having a steady flow of information coming in all year round will be especially helpful as we count down to Making Tax Digital. Once again, the integration into the rest of the CCH Central suite is a huge bonus in coordinating all client work."

Nearly two decades on, Wolters Kluwer software continues to align with the business and supports the team in meeting new compliance challenges. Julie puts it neatly, "We've grown together!"

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Find out how we can help



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