

Case Study

Northern Beaches Accountants

Freedom
to grow,
with 100s of
leads a year
generated
by CCH Web
Manager



Benefits

- **3 hours per day saved**
by digitising workflow
- **150+ leads generated**
per year through website
- **50% revenue increase**
for the financial year

"I've had a 50% increase in turnover in the last financial year. And that's absolutely connected to how I've streamlined admin and built a strong sales pipeline with Wolters Kluwer CCH solutions."

**Paul Bailey, Principal,
Northern Beaches Accountants**

Moving to CCH Web Manager, together with CCH software and content solutions, fast tracked Northern Beaches Accountants into an efficient, automated practice that generates more leads and revenue than the firm ever expected.

Efficiency from day one

Northern Beaches Accountants was designed as a paperless office, with professionalism and efficiency the cornerstones of its client service. As a long-established, happy CCH Web Manager customer, the firm recently commissioned Wolters Kluwer CCH to build a second website to support expansion into Newcastle and the Gold Coast. The CCH Web Manager team had the new website live in just one week.

CCH Web Manager provides specialist website design and management specifically for accounting firms, which was a key benefit for Paul Bailey, Principal of Northern Beaches Accountants.

Company Details

Name: Northern Beaches Accountants
Web: northernbeachesaccountants.com.au
Size: 3 Employees

Solutions

- CCH Web Manager
- CCH iFirm Document Vault, Client Accounting, Client Portal, Tax
- CCH iKnow Income Tax
- CCH iQ
- CCH Q&A



"With my practice automated and having really great websites that bring me business, I've bought myself at least three hours a day to live rather than work. If you're not using CCH, you're missing an opportunity. It's as simple as that."

**Paul Bailey, Principal,
Northern Beaches Accountants**

"I can relax knowing my sites are purpose built for clients looking for accounting firm services and are securely hosted. The website design with menu headings, which are directly relevant to my clients, can be viewed from any device."

All CCH Web Manager websites are built in a responsive design, which means the elements on the webpage automatically resize and adjust to make reading information and completing forms on smaller screens, like mobile phones and tablets, easy.

Enormous productivity gains

"There are many productivity gains with CCH Web Manager. From the built-in contact forms, specialised content provided by Wolters Kluwer, as well as integrated links to our partner accounting software platforms, the time saving is enormous."

CCH Web Manager allows for easy embedding of forms or third-party apps like Calendly; Paul includes a link to his website appointment booking page in each client email. These result in "fewer time wasting calls for both me and my clients," Paul says.

"I have a suite of Wolters Kluwer CCH solutions working hard for me - including CCH iFirm Client Accounting and Client Portal, and the marketing automation tools linking CCH iQ."

As the CCH iFirm Client Portal is linked to the new website, the process for straight forward, individual tax returns is now so easy. Clients complete and upload a checklist, with associated documents, via the CCH iFirm Client Portal. "As an example, I might spend an hour emailing three clients, and create jobs in the system for that work to be done by my team."

"What's increasingly important to me is freeing my time and having everything at my fingertips to work remotely. By keeping track of what people are looking at across my websites, I know what's going to be of interest to add to my social media and blogs," Paul says.

Converting new business

CCH Web Manager acts as a digital sales rep for the firm. "It's very good at attracting accounting firm clients. I land two to three new opportunities each week directly related to CCH Web Manager. Business is now constant throughout the financial year - so I can keep two full time employees busy."

For Paul, Wolters Kluwer CCH are the ultimate professionals: "They give great value for money because the service doesn't stop once the product goes live. If I ask a question this morning, I guarantee you, the problem will be solved by afternoon."

Find out more about CCH Web Manager

Specialist website design and management for your accounting firm.

Visit: www.wolterskluwer.com/en-au/solutions/cch-web-manager

Email: Au-wolterskluwer@wolterskluwer.com

