

CUSTOMER SUCCESS

CPY Business Solutions Ltd

This bespoke bookkeeping firm is a thriving success using Sage Business Cloud.



CPY Business Solutions is a bespoke bookkeeping firm based in Knaresborough. Owner and Director Catherine Pyman is a fully qualified member of The Institute of Certified Bookkeepers (ICB). She formed the business in 2010 when looking for a more flexible career path, having spent the previous 20 years working in commercial banking.

Today, with the help of Sage, Catherine works with business owners and organisations across the whole of Yorkshire and the North West. She has a varied portfolio of clients, including sole traders, partnerships and limited companies.

Working with a network of local accountants has been instrumental in the business success. Catherine prides herself on her reputation and is passionate about helping clients thrive and survive. Working as part of a team with her client and their accountant is a proven recipe for success. She helps businesses understand in real time their cashflow position and provides bookkeeping support to accountants' clients.

This helps the clients focus on running their businesses, in the knowledge that the books and records are being kept up to date and prepared accurately, allowing the accountant to finalise accounts and provide relevant tax and accounting advice.

Company

CPY Business Solutions Ltd

Location

North Yorkshire

Industry

Bookkeeping

System

Sage Business Cloud Accounting and Sage 50Cloud Accounts

For more info, visit: sage.co.uk



Catherine has built a reputation that has become renowned for the excellent bookkeeping services provided, specialising in Sage. Catherine's success is built not only on her skill in managing her clients' books, but even more so, **her ability to explain financial matters in a way that clients can understand.** While finances may seem daunting, business owners are quickly put at ease knowing that, with Catherine, everything is explained and simplified, so they gain a full understanding of the financial position of the business.

Clients aren't the only ones benefiting from Catherine's approach to bookkeeping. Accountants like Steve Worrall, a partner with SW Accountants, really appreciate the services provided, especially as the majority of their clients also use Sage Business Cloud accounting software. "Catherine provides a vital link between the processing of accounting data provided by clients to the preparation of fully reconciled and



“...we are confident that everything has been prepared accurately, is complete and to a standard which enables us to carry out our work as expected by our clients.”

balanced control accounts, culminating in the preparation of a detailed and accurate trial balance. Not only does she possess the necessary professional skills and qualifications, she also has a natural rapport with the clients and is able to build a friendly and trusting relationship. Consequently we know that when we receive the information from Catherine's team, we are confident that everything has been prepared accurately, is complete, and to a standard which enables us to carry out our work as expected by our clients.”

Catherine takes huge pride in being an ICB Bookkeeper and supports local bookkeepers in the region. She is Chair of the North Yorkshire ICB Branch and is also a member of the ICB Advisory Council. The branch meets monthly to share best practices and keep up to date with current issues affecting the profession. **She has often been supported by Sage keeping local members up to date on issues such as Making Tax Digital (MTD), General Data Protection Regulation (GDPR) and Auto Enrolment.** Catherine has received recognition for her efforts and was awarded ICB Branch Chair of the Year in 2018. She has also previously been a finalist for Small Practice of the Year.

The challenge:

When initially setting up CPY Business Solutions, Catherine was faced with the challenge of choosing a suitable accounting software that would adequately support her with the means to provide the tailored services required to become a successful bookkeeping business in the area with a unique selling point.

Differentiating from other local bookkeepers, after due consideration Catherine discovered that Sage accounting software was able to provide the required facilities, backup and support.

“Having completed my ICB qualifications using Sage, I was already familiar with the software and what it had to offer. There was no cloud software or very little when I started. Use of cloud-based storage systems did not exist. Invoices were very rarely emailed.”



Catherine goes on to explain that back-ups had to be passed to clients and accountants, often resulting in duplication of work and the risk of data being susceptible to corruption. Thankfully, due to the progression of Sage technology and improvements in cloud-based software, this has now been eliminated.

The practice has continued to grow and operate successfully, bringing new challenges, as clients recognise her ability to help, not only with their accounting but also their business growth. As demand for her services continues to increase, Catherine has made the decision to recruit staff and spread the workload across her team. Staff numbers continue to grow successfully, and new employees are encouraged to continue their training and development through Sage software.



The solution:

With time, technological improvements and Sage, the business now has the tools required to run a successful bookkeeping firm. Shortly after hiring her staff, Catherine was able to use Sage to implement and streamline processes. These processes, she says, have led to more efficient records.

“With Sage 50cloud and Sage Business Cloud Accounting, we are able to work on the client accounts simultaneously.”

For clients who live in remote areas and cannot reliably depend on wireless technology, Sage Drive gives her clients this same feature. This provides a huge time saving for Catherine.

When asked what she likes about Sage, Catherine lists many benefits. Visibility, reports, bank feeds, batch invoicing and overall ease of use are just a few of the ones she mentions.

“Sage allows me to produce the relevant reports required for each client’s needs”.

CPY uses Sage software to maintain their own records and accounts and provides the required CRM for the practice.

“We really enjoy working with Catherine and finding ways to support her business through our software innovations.”



When asked what her favourite feature is, she doesn't hesitate. "The support. With other software, you've got to send an email and wait for an email to come back."

She goes on to say: **"I know that whatever the problem is, it will get resolved, which you just don't get from any other software."**

Catherine's Account Manager at Sage, Kevin Brown says "We really enjoy working with Catherine and finding ways to support her business through our software innovations.

"With other software, you've got to send an email and wait for an email to come back."

We recently launched correction transactions in Sage Business Cloud Accounting, saving Catherine time when correcting any client errors. Catherine knows we are always available for support on software or even advise on her business and we attend events together".

Julia Wedgwood, Insight lead at Sage works closely with Catherine says, "I really enjoy working with Catherine and supporting her at the Yorkshire ICB Branch meetings. This has been a great forum to help keep her ICB branch members up to speed with key changes such as GDPR and MTD in a forum that works for their practice"



Catherine Pyman

Professional Bookkeeping and Financial Management, CPY Business Solutions

With over 20 years' experience in commercial banking, Catherine has worked across a wide range of industries for clients with turnovers up to £100million.

Based in Harrogate, Catherine now works with business owners and organisations across the whole of Yorkshire and the North West, with clients including sole traders, partnerships and limited companies with a turnover up to £2million.

Catherine is an active member of the Institute of Certified Bookkeepers, holding the role of ICB branch chair in her region, supporting new and existing members and advising them on their businesses. Catherine recently won Branch Chair of the year at the ICB Bookkeepers Summit.

The bottom line:

CPY Business Solutions has continued to operate successfully with year on year growth. **Not only has turnover increased each year, it has done so at a consistent rate.**

Supporting her through this has been Sage, and Catherine credits the software as a contributor to her growing success.

“It is the software I am most comfortable with and I recommend to my clients.”

The future:

While Catherine embraces the possibilities of growth, she has no plans to change her business philosophy and unique and successful formula. She cites her integrity and professionalism as part of her company's ethos. This has clearly served her well, leading to strong and lasting relationships.

“I find that clients treat me as a part of their team, often referring to my role as an integral part of the business. With that comes mutual benefits which can only lead to continued growth and success for all parties in the future.”

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