

SUCCESS STORY

Boosting client engagement with Sage and AutoEntry

DPC Accountants improve their client service capabilities



With a customer base of over 3,500 clients, DPC Chartered Accountants prides itself on delivering exceptional service. Founded in 1943, DPC has become the largest independent accountancy practice in Stoke-on-Trent. Its clients span the UK and range from sole traders and start-ups to large audit clients with half a billion-pound turnover – and everything in between.

DPC offers all the standard regulatory accountancy services - auditing, payroll, tax returns, VAT – as well as value-added services such as proactive tax planning, asset protection, pension solutions, and business start-up advice.

Key outcomes:

- Error-free time savings – 4 x faster for bookkeeping
- Real-time analysis of clients' accounts
- Freeing up of staff time to boost client engagement
- Provision of services to business clients beyond bookkeeping



Company

DPC Chartered Accountants

Location

United Kingdom

Industry

Accountants

Sage Products

Sage Business Cloud Accounting

Sage AutoEntry

Sage Payroll Bureau

For more info, visit

www.sage.com/accountants



Sage products have helped DPC Accountants become more efficient

“DPC Chartered Accountants has boosted its capacity for client engagement and achieved significant time savings with Sage Business Cloud’s AutoEntry solution.”

Michelle Coates, Associate Director, DPC

Maintaining high standards

Having experienced rapid business growth of 42% and handling around 1,700 limited company customers and 1,800 personal tax return accounts, DPC faced a two-fold challenge.

First, the accountancy practice was keen to maintain its high standards of customer service without resources. Secondly, the company’s growth had come from the SMEs and start-ups community, which are constantly growing and evolving, requiring a variety of tax and business consultancy.

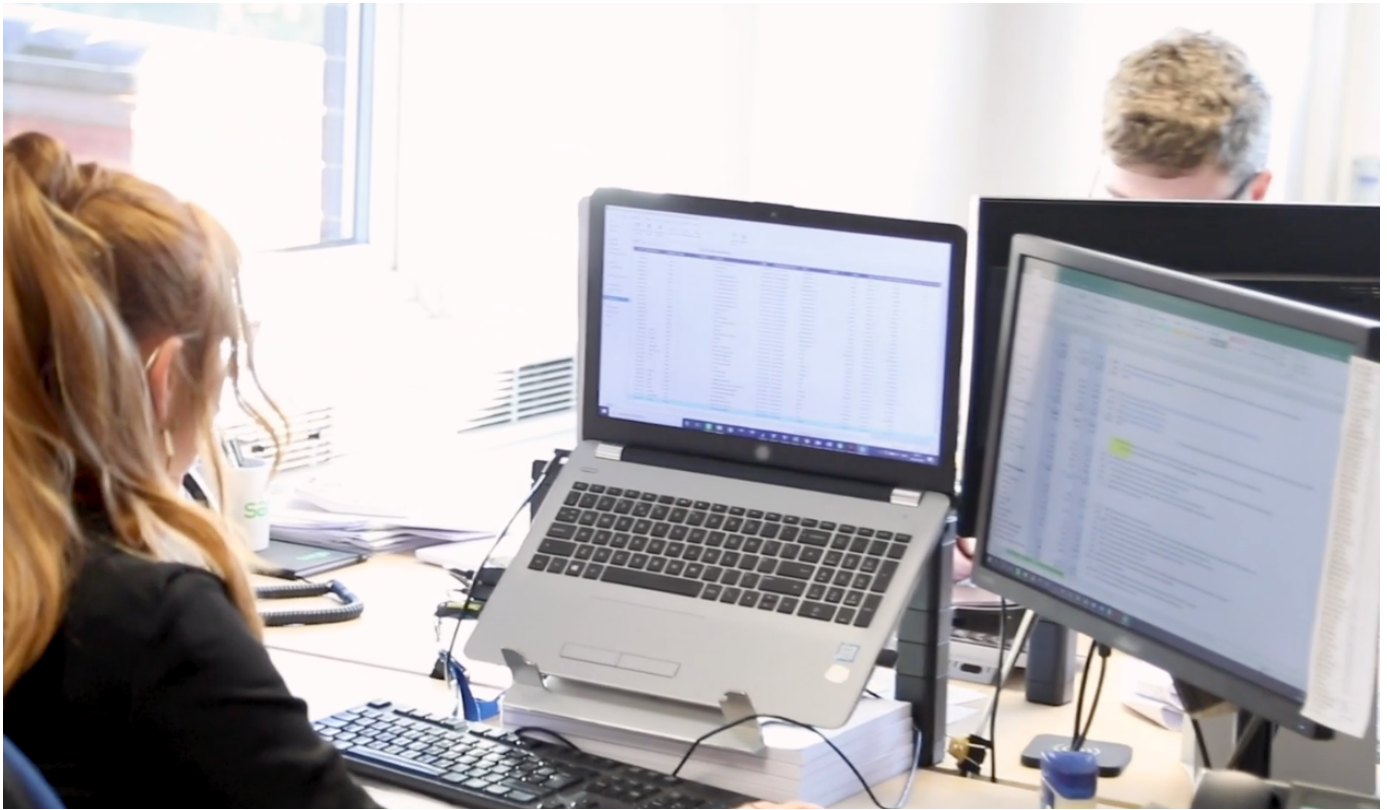
“Naturally, growing clients need additional help fast,” says DPC Associate Director Michelle Coates. “But obviously the more clients you have, the more time you need to dedicate to looking after each one, and we’re finding the team doesn’t have a lot of additional time. Yet building those relationships is massively important to us – both to provide exceptional service and maintain client retention.”

DPC needed to have a clear view of all its client’s financial and business data in one place, to ascertain how clients were performing. “It wasn’t enough to look at their accounts from a year ago; we needed a real-time picture of where the business is in terms of cash flow, revenue and profit,” says Coates.

Streamlining customer processes

With this in mind, Coates thought about how technology could support DPC’s future challenges. Already using Sage Business Cloud Accounting, DPC began to look at how it could streamline its own processes and utilize more aspects of Sage software.

Sage Business Cloud Accounting was recommended for the majority of DPCs clients, particularly those who weren’t using any software. It provided a smooth transition for businesses to use digital accounting software for the first time, and gave DPC a real-time overview of its customers’ data – crucial for greater client engagement.



With the time savings from AutoEntry, DPC can focus on other elements of the business

“Last year it took us 16 hours to analyze a sole trader’s bank statements. Using AutoEntry it has taken a quarter of the time – just four hours this year. If we extrapolate that across our business, the hours we are saving are significant.”

Michelle Coates, Associate Director, DPC

Real-time accuracy

“Sage Business Cloud Accounting is very important in terms of the future of accounting. It’s so easy to use that it will encourage clients to engage with the accounting side of their business more and keep on top of their accounts. I like the fact that clients can raise sales invoices, email them out immediately, and even receive payment straight away,” says Coates.

From DPC’s perspective, Sage Business Cloud Accounting provides a vital link with its clients’ data at any given moment in time. “I know when I go into a client’s account, it’s going to be more or less 100% accurate, which is very important when you’re giving advice to clients.”

Driving time-saving through automation

To provide services beyond bookkeeping, Sage suggested DPC introduce Sage AutoEntry to speed up the bookkeeping process. Eliminating manual data, Sage AutoEntry automates the extraction and processing of bills, invoices, expenses and receipts, and inputs them directly into accounting software.

Following a successful trial of AutoEntry with one of its sole trader accounts, DPC says it has been blown away by the time savings. The vision is that DPC will use AutoEntry internally to automate as much of its bookkeeping processes as possible, before offering it to client. “The more that we automate the practice, the more resource becomes available to help our clients,” says Coates.



*Sage has improved DPC
Accountants' ability
to serve clients*

“Without a doubt, Sage Business Cloud Accounting has helped the practice to better engage with clients.”

Michelle Coates, Associate Director, DPC

Boosting client engagement

DPC estimates that 99% of its growth has come from client referral over the past few years, so continuing to offer exceptional service to its clients is vital in maintaining a high referral rate. Coates says “without a doubt, Sage Business Cloud Accounting has helped the practice to better engage with clients”.

“We now have real-time information from clients; when they ring and ask questions, we can log into Sage Business Cloud Accounting and see straight away how the business is performing, what the cash situation is, and offer real-time current advice,” says Coates.

“Ahead of a call with them, I can log into the Sage platform to see how they're doing, and then we can have a genuine real-time discussion about their finances and talk about forecasts to the end of the year armed with the current data,” she adds.

Sage Business Cloud Accounting:

From sales and purchases to cashflow, VAT and reporting. Sage Business Cloud features support every step in your business process. Elevate your productivity and efficiency with software that frees you to perform at your best.