

# INVU: CASE STUDY

Accountants

## KEY BENEFITS

“We could tell Invu was  
A proven system that  
would grow with us as  
We expand as a  
company”

Steve Griffiths, Practise  
Manager,  
BHG Chartered  
Accountant.

SORTED

## BHG Chartered Accountants turn to Invu for document management

BHG Chartered Accountants, a Swindon-based accountancy firm is using Invu's document management solution to increase office efficiency. BHG is a growing firm and intends to double in size over the next four years. The system, implemented by an Invu Accredited Partner, has enabled the company to comply with regulations, save space and reduce costs. The company prides itself on being an IT literate company and believes that in order to recruit high quality staff, it needs to ensure it's office practices are as efficient and technologically advanced as possible.

The Company's primary means of communication is via email, which meant the company needed a document management solution that would work online. Company policy is to retain client documents for a minimum of seven years which meant managing filing systems and space would become more and more of a problem; as Steve Griffiths, Practice Manager at BHG Chartered Accountants, explains: "Whilst the utopia of a totally paperless office doesn't exist, particularly in the accounting sector, the "almost paperless" office is something we aspire to. We needed a system that would enable us to retain records online, that would be simple to use and reliable."

BHG looked at a number of document management solutions, including Invu's. Their Invu Accredited Partner worked closely with the business to ensure that the solution chosen was the most appropriate for the needs of the accountancy firm. Whilst the initial outlay into the technology seemed significant, it soon became apparent that the benefits and efficiency gains that could be achieved would far outweigh the costs.

"Following our evaluation of a number of possible solutions, we decided Invu would best suit our requirements," commented Steve Griffiths. "We could tell Invu was a proven system that would grow with us as we expand as a company. The system has proved to be reliable and easy to use, even for those with limited training or technological knowledge."

BHG purchased a 10-user Invu licence to cover the accountancy, auditing and taxation side of the business, with a view to extending the software to handle it's corporate recovery business over time.

"The benefits of installing Invu have been significant," adds Steve Griffiths. "It provides us with instant access to documents online - any member of staff can locate documents with minimal effort rather than needing to resort to hard copy files. This means we can work far more efficiently, provide our customers with a much higher level of service and means we have less administrative requirements. As our company grows over the next few years, we'll continue to benefit from putting in place such a robust document management system and are confident it can grow with us."

Geoff Rawles from Invu comments: "Like many accountancy practices, BHG was finding document management an onerous task. Whilst manual filing meant the company was meeting it's requirements for storing data safely, managing hard copies on a daily basis was time consuming and not cost effective. We're pleased to have helped BHG install our software and look forward to working with the company as it grows over the coming years."

BHG's Invu Accredited Partner adds, "BHG is a very dynamic organisation. They recognised the need to be even more efficient with their filing and to be more responsive to their clients in order to provide a better service. We are delighted to have been able to work with them to satisfy their requirements with the market's leading solution from Invu. We look forward to extending the relationship in future years."