INVU:

Mayes Business Partnership

Enhanced client service & reduced costs

Both the sheer scale of document retention & the risk that comes with storing documents onsite prompted Mayes to move to an electronic Document Management system.

"We are so pleased with Invu & the integration to IRIS - We frequently recommend the product to other accountants in our area."

INVU:

Mayes Business Partnership

Document Management | Email Manager
- Integration with IRIS -

Mayes Business Partnership (MBP) is a firm of Chartered Accountants and business advisors based in Accrington. MBP is one of only seven AVN Centres of Excellence in the UK.

The Challenge

Accountancy firms need to comply with the increasing amounts of document and record retention legislation. Mayes Business Partnership (MBP) is no different. Having to retain client files for six years has created a paper overload and exhausted the available storage space for paper documents. The sheer scale of document retention for over 500 clients had created all too familiar paper overload and storage issues. Storing all documents on site also created vulnerability in the event of a major disaster when all critical information would have been lost. A document management system was needed to mitigate this risk.

> *"We can deal with calls by having information at our fingertips rather than having to retrieve information from files & ring clients back. Records are in one place and can be obtained at the click of a button."*
>
> Anne Parkinson,
> Managing Director

Solution Summary

▸ Reduced costs

▸ Enhanced client service

▸ Overall efficiency gains

▸ IRIS integration

▸ Smaller carbon footprint

The Approach

MBP researched the document management market to find a solution to suit its needs, Invu's flexibility and user friendliness caught the eye. Managing Director, Anne Parkinson explained, *"Flexibility was a driver for our selection. We already used IRIS so it made sense to use Invu with the IRIS integration, rather than spend more time developing another DMS to fit. Invu provided a local reference site to understand the practical realities of working with the software – this was a really useful exercise in firming up our thinking."*

Initially, MBP purchased 28 Invu Document Management licences. A month later, once the practice was comfortable with the software and staff adoption going well, the next phase of the project was rolled out with the deployment of the IRIS practice software integration.

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Swift Adoption

Anne explained the process for implementing Invu. *"Invu was installed over a couple of days. Some of the team were keen to get started straight away, others were wary but could immediately see the benefits. It was a matter of building up their confidence with the software."* Anne continued. *"We all use Invu now. Reception open and scan the post in the mornings and distribute it electronically via Invu's team Intrays. Fee earners can then can decide what action to take, whether it's just filing away or passing to another person to handle. IRIS documentation is all electronic so that goes straight into Invu. All post is shredded after three months."*

"As our paper archives reduce we will create more space within the company & this will make a better working environment for all team members."

Efficiency Gains

Invu has provided the team with greater speed and efficiency when dealing with client queries. All the information is to hand on each member's desktop. *"We can deal with calls by having information at our fingertips rather than having to retrieve information from files and ring our clients back. Records are in one place and can be obtained at the click of a button."*

Improved Client Service

Invu provides a number of benefits for the practice. Fee earners no longer have to leave their desks to answer client queries - all the information is stored in Invu and instantly accessible. Documents scanned include letters, copies of accounts, company secretarial documents, even copies of cheques. Anne explained, *"We have the same number of employees but we are much more efficient in recovering documents. When clients call we can immediately email documents to them now whereas previously we'd have posted or faxed a document with greater delay. Service is greatly improved as we no longer waste time obtaining paper files."*

Going Green

HMRC, company secretarial and practice assurance demands mean extensive document retention requirements and these make environmental aspirations difficult to fulfill. However, MBP have their own green policy. *"We are always mindful of the impact on the environment. We like to do our bit by recycling paper and printing less. Invu enables us to take one step closer to becoming a green practice,"* says Anne.

Reduced Expenditure

There are reductions in print costs, postage fees and even telephone charges (after all queries are now more often dealt with immediately, rather than subject to a call back once the client file is found). Anne sees dual benefits here, *"In addition to the enhanced service benefits we are confident that the savings amount to a team member's salary."*

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