



Chris Davies, Ross Brooke Chartered Accountants

Multi-office accountancy firm invests in the latest technology to offer clients a streamlined service and improve their cashflow



Ross Brooke Chartered Accountants started from a single office in Newbury in 1994 and today the firm deals with a wide range of clients across the Thames Valley, including audits for individual companies and large groups, owner managed businesses, Charities, LLPs, REITs, HNWLs and many tax return cases.

Chris Davies joined Ross Brooke 20 years ago – about the same time the firm were establishing a relationship with Thomson Reuters, and became an equity partner in 2008. He is now one of six partners in the firm and manages a large portfolio of clients; mainly owner-managed businesses in the Thames Valley.

The firm has expanded considerably, achieved by a mixture of organic growth and acquisition of other local practices, and with such growth came the need to review practices and processes.

“When I joined the firm, we could handle most workflows and reporting, such as staff efficiency, staff availability, job planning, location of clients’ records, and approaching deadlines through a variety of spreadsheets.” Chris recalls, “In fact, I knew most of the year-ends and deadlines, and indeed, where any member of staff was on a given day in my head. But as the practice grew, it became more and more difficult to keep track of everything that was going on and there was no cohesion between the various spreadsheets.”

“It was certainly no longer possible to simply remember everything that was going on and consequently both our cashflow and customer service suffered, as work would back up and WIP would increase. Manual systems were simply no longer capable of running a growing practice and, in truth, had not been capable for some years.”

With the landscape changing due to the company growing so quickly, it was clear that Ross Brooke needed to explore practice management software opportunities, so they looked to Thomson Reuters for help: “We needed an end-to-end system that both staff and partners could rely on to clarify responsibilities and track the progress of jobs to ensure that workflow was smooth and there were no hold ups in the system.” Chris says, “This would enable us to offer our clients a more streamlined system and improve our own cashflow.”



“The Thomson Reuters staff were amazing and their input and advice during the process helped us to clarify our objectives. No request was ever too much trouble and they would go away and come back with each request successfully implemented. If only all customer service could be this good!”

— Chris Davies

Firm

Ross Brooke Chartered Accountants
Chris Davies, Director

About

Ross Brooke Chartered Accountants employs 95 staff across four offices in Newbury, Swindon, Hungerford and Abingdon and offers accountancy, taxation and business advisory services. They have a broad range of clients, ranging from large corporates to family businesses and individuals.

Website

Learn more about the firm and the services they offer at www.ross-brooke.co.uk



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THOMSON REUTERS®

"Having used the Digita Professional Suite for over 20 years, we already have a good relationship with Thomson Reuters. We were very interested to learn about the new Digita Practice Advanced (DPA) product when it was released."

DPA offers Ross Brooke a bird's-eye view of the practice, clients and staff with customisable dashboards, automatic tracking of billable time, and the ability to manage client data and coordinate marketing activity centrally.

Chris has already seen first-hand the benefits of using the solution: "Now that we have been using DPA for a few months, the improvements to our systems and cashflow are clear." He says, "I can see immediately what jobs are due in, where jobs are in the system, who is working on them and when I can expect them to reach me for billing."

"From a staff perspective, they can see exactly what tasks they are expected to undertake and the target dates for that work. Consequently, responsibilities are far more transparent."

"The reporting is far better than anything we had previously and I particularly like the way that each person can tailor and save their own reports onto their dashboard. They can see exactly what is most important to them, whether that be deadlines, tasks, debtors, WIP, staff productivity or perhaps a mixture of all of them."

As with any data management, a certain amount of time is required for preparing the new systems and to truly understand the benefits. Chris was suitably impressed



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with the support from the Thomson Reuters team: "It's important to realise that DPA is not a product that you simply take out of a box and expect to use." He insists, "If you want to get the most out of the product, then you do need to give real thought to how you will be using it and what you want to get from the product."

"From the very start, the excellent support and training proved invaluable." He adds, "We spent a great deal of time in webinars, conference calls and training days with the Thomson Reuters staff, honing down what exactly we wanted to get from the system."

Chris has seen the benefits of using practice management software, and is quick to recommend DPA to other practices: "Our experience to date and the implementation has been first class." He says, "I would have no hesitation recommending this product to others and, indeed, have already done so."



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To find out more about Digita Practice Advanced [visit our webpage](#)

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