



## Annie Davies, Grace Frank Chartered Accountants

Chartered Accountants based in Shoreditch who have benefitted from bespoke Thomson Reuters training.

Grace Frank Chartered Accountants provide accounting and tax support primarily to small and medium sized owner-managed businesses. The firm was established in October 2012 by Morisha Christy, who has over 25 years' accountancy experience. In the early years Morisha worked as a sole practitioner, but the firm has since grown by over 50% in the past few years. Currently, Grace Frank have a team of eight, including two full-time and three part-time accountants.

Grace Frank developed a relationship with Thomson Reuters before the business was formed and have been successfully using the Digita Professional Suite. However, with an ever-growing team and changing demand, it became clear that the team were not utilising the suite of Digita products to their full potential.

Annie Davies, Morisha's PA was tasked with arranging suitable training which, she says, was long overdue at the time: "When I started about 18 months ago, we talked about the Digita system and we were aware there were a lot of reports in there that we weren't using," she admits. "It's a great system but the training had been a few years before and we just didn't have the time to sit and read the various manuals." She adds, "I did all the training modules, so I was au fait up to a certain point, then Morisha and I decided we needed to pursue some up-to-date training."

However, being a small and busy practice in a thriving part of London, there would be inevitable challenges. Taking any team members out of the business for any length of time would have a detrimental effect on workload, so Annie picked up the phone to Thomson Reuters.

"I spoke to the Welcome Services team initially, and they were really helpful," she says. "We knew we had to complete the training in one day to reduce any negative impact on our business as this process would affect all five of us."

"We also agreed that this training had to be bespoke to our business and face-to-face in house at our office. The Thomson Reuters team were all very accommodating with these requests and the set up was very easy."

A date was agreed and the reins handed to Rattan from the Thomson Reuters training team to agree the finer details with Annie. Firstly, Rattan made a fact-finding visit to Grace Frank's offices to ensure he was well placed to deliver quality training that was relevant to the business needs.



"We knew we had to complete the training in one day to reduce any negative impact on our business."

— Grace Frank



Grace Frank Chartered Accountants

**Annie Davies**

PA to Founding Partner  
Morisha Christy

### About

Grace Frank are a traditional firm of accountants based in Shoreditch, London. Founded by Morisha Christy, the firm works in diverse industries and different business cultures, serving a wide range of clients from start-ups through to well established, larger businesses.

### Website

Learn more about Grace Frank and the services they offer:  
<https://www.gracefrank.co>



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Annie was especially pleased by the actions of the consultant prior to the session.

“Rattan contacted me a week or so before the training day and we discussed what we wanted to go through and what we wanted to achieve. He was then able to allocate what he thought was a suitable amount of time per person. So, we all knew what we needed to do on the actual day.”

“Work wise, you don’t ideally want someone coming in while you are trying to work at the same time and spend a whole day training, so we broke the day up. He worked around the office, sat with us all at our own PC’s so we could talk about the work we do and what was relevant to us. This experience was very personal to us and Rattan advised and trained us based on our specific needs.”

The training ultimately proved highly beneficial to the business: “The training was very helpful and we have benefitted greatly.” Annie says: “Rattan understood very quickly how we all individually used Digita so the training was tailored to match our needs.”

“Rattan was highly professional. It was informative and not laborious at all and we could get on with our work while we learned, while answering all our questions.”

“The one-to-one element was good, as was the fact that Rattan did his research so he knew what it was we wanted and didn’t just come in cold. I’ve done training courses before like that and you can waste the first few hours, which is precious time.”



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And the result means that the key people at Grace Frank are able to use the data more effectively and time saved is time that can be spent being more productive: “Morisha did say that there are some reports that she didn’t know how to generate, so Rattan found solutions that have helped her. That alone saves her 2-3 hours per week, time she can spend working with clients rather than working on data.”

The training day has helped an already strong working relationship. Annie says “We are very happy with Thomson Reuters and I would definitely recommend the Digita Professional Suite to other accountants - I would recommend the training too.”



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## CONTACT US TODAY

03450 180 904

[digita.info@thomsonreuters.com](mailto:digita.info@thomsonreuters.com)  
[tax.thomsonreuters.co.uk/info](http://tax.thomsonreuters.co.uk/info)

