Customer Testimonial

Practice Management Solution

" WorkPool is a must have. I cannot see how or why any accountant can work without it. "

Ryno Bekker
Accountant and Business Owner
ATB Consulting, part of the IPMG Group

Accountants & Auditors

Why do you use WorkPool?

We use WorkPool as a workflow and task management system, to make sure things happen when they should and to ensure we don't drop the ball. WorkPool is an integral part of our practice management and we use all of its task, activity, workflow, database, document management and email integration features. It also ensures our team members can work together without them being physically located together.

A small practice of six people, we offer various accounting, tax, bookkeeping, secretarial, BEE, financial management advice and consulting services. WorkPool levels the playing field and allows us to provide an equal or better service than a larger practice would.

How does WorkPool help you and your practice?

- **Workflow and task management**

First and foremost we use WorkPool for our day-to-day management of tasks and workflow. We also log all our time on WorkPool so I can see exactly the time spent per job or timesheets per week per team member, etc. I am quite a hands-on manager so I typically allocate and manage most of the tasks. If something is not a once-off task I set up a recurring task for it. We often use recurring tasks as we set it up once and then WorkPool reminds us to do work as and when required. We provide several services that include registrations and various recurring accounting, tax and secretarial responsibilities such as submitting annual returns, VAT returns, Tax returns, PAYE returns and so on. These can recur on a monthly, bi-monthly, annually, or ad hoc basis.

- **Common directory / database and managing access to information**

WorkPool is our primary database. We store all of our client contact and profile information - including some source documents like ID documents, trust deeds and so on - in WorkPool. We also store all of our SARS reference numbers like income tax and PAYE numbers, etc. so they're easy to find. We can also search for information or deal with queries. As the client's service agreement and scope of services is also visible in WorkPool, we can easily review it annually when we meet with a client and negotiate services or fees where applicable.

We use WorkPool to manage access to information by setting up permissions per user so that people can only access or change information that they are allowed to see. This is critical when it comes to, for example, implementing the requirements for PoPI (the Protection of Personal Information Act). We run more than one business unit on the same WorkPool and deal with a lot of sensitive information. As such security and an audit trail is very important to us.

Continued ...

How does WorkPool help you and your practice *(continued)*

- **Email management and sending bulk email or text (SMS) communications**

We recently moved over to WorkPool's integrated email which made a significant difference. Initially there was some resistance from users, but I have been a user of WorkPool for 11 years and knew the product and believed it would work. So we pushed through this and I am glad we did! I had a case recently where a client sent an email to the Receiver (SARS), or he thought he sent it, and I was CC'ed in.. He gave instruction to me to provide SARS with the information they needed, so I just hit "reply all" on his email to respond. WorkPool recognised my client's email address, but warned me that the other address I was sending the email to was either new or invalid. It turns out that the client made a mistake and would have emailed the wrong person (not SARS). If it wasn't for WorkPool I would have continued as usual in Outlook to "reply all" and sent the information to the same address. This is just one example of where WorkPool prevented me from making a mistake and the client complimented us on picking up the issue so he could correct it.

We also use WorkPool's email templates to draft standard email communications. This saves time and allows me to set up my own correctly worded templates for team members to use and communicate - without the need for me to double-check everything. It can also link documents to templates. This means if I change an agreement in one place it automatically updates the email template in another, like a new client take-on for example. We also send out bulk email communications such as annual notices and newsletters through WorkPool and text messages (SMSes) to keep our clients informed about tax announcements, etc.

- **Professional, efficient and quality client service that adds real value**

Our goal is not just to provide a good service, but to add value to our clients in whatever way or form that we can. To do this efficiently and effectively we either need systems or need to put in extra time and effort, which increases costs. We believe clients are willing to pay for a superior service as long as the value received is worth it. Small things can make a big difference. So when I chat to a client on the phone I have access to all his/her notes and communications and can refer back to previous conversations or emails to quote them on exactly what was said. People are often impressed by this and how well I remember things, but it is because I use WorkPool.

I often work afterhours and with WorkPool I don't need the person who did the work to be in the office with me. Their notes must just be good enough for me to work with. Recently for example, the team had gone home and a client sent us an email asking about his tax return. WorkPool identified the case the email referred to and I could click and open the task to see its status. I saw that the case had already been reviewed and that the team member had some unanswered questions. All I did was copy and paste the notes from WorkPool into a reply email to the client. The work could continue without that person being there. Without that it may have been 2 to 3 days later before they would have responded. I don't like delays and want to get things out quickly; WorkPool allows me to do this.

- **Training and staff turnover**

Our industry has a high staff turnover, so training and dealing with new team members can be a big issue. To help manage this we don't assign tasks directly to someone, we assign tasks to groups that we have set up based on the skills and experience required to do a job. So when someone new joins us I don't throw them in the deep end, looking at his/her main responsibilities and functions and then slowly add the person to more groups as we go. That way he/she only sees and focusses on the things applicable to them and that they can do, which isn't so overwhelming. I can plug people in and out of groups as I go so it is easy to manage and I can also keep track of how well they perform in certain areas.

Typically when new team members start and they don't like WorkPool. Six months later they love it and cannot cope without it! Very often new team members don't receive proper training; in fact, many old users have never had proper training on WorkPool. I just show them "this is where you find your tasks", "this is how you add your time and activities and where to attach your files". They cope, so it shows WorkPool is intuitive and that self-training is possible.

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How has WorkPool changed the way you work?

We’ve been using WorkPool for so long that I cannot even remember how I worked before. I do not know how I coped back then. I look at how other accountants work now and I feel we are lightyears ahead.

I spend about 2 hours a day on task management and email. These are all things that need to be done though and that I would have done as a matter of course to ensure we don’t drop the ball, so I don’t consider it a waste of time. People can use this as an excuse not to work on WorkPool but they spend as much time, if not more, on maintaining their own systems, without the benefits. They also don’t record things accurately. WorkPool is my “new normal”; I don’t have anything to benchmark it against.

I have also recommended WorkPool to some of my clients for their own businesses. I even have access to some of them too so that we can provide a more integrated service.

What don’t you like about WorkPool?

WorkPool is not a financial system. It works with your own billing or invoicing system. WorkPool provides all the source information for billing and tracks all the communication in and around invoices and payments. I would have preferred it if the invoicing could also be done through WorkPool. As we have built our own timesheet report that extracts data from WorkPool that we use for billing, we have to work around locking things down so people don’t spend more time on a job after it’s closed off. Other than that I like everything. Everything has its own benefits.

Would you recommend WorkPool?

Yes, WorkPool is a “must have”. I would definitely recommend it. Without WorkPool I wouldn’t be able to operate. I cannot see how or why any accountant can work without WorkPool either.

The way forward?

We definitely need to make more use of processes going forward. Even though I am a hands-on manager and we are only six people adding processes is essential. You need to tweak rules and stay up-to-date with legislation on a continuous basis. Using processes allows us to do this and consistently delivery.

I think there are changes afoot in the industry and we need to be prepared. I follow trends in the U.K. regarding value pricing and the traditional hourly billing structure is under pressure there as well as in the U.S.. Going forward we probably won’t charge an hourly fee, so I plan to move away from this now. I want to offer a service at a fixed price and, if my internal processes and resources allow me to do the work for less and faster, I should be able to benefit from this. The perception is still that a client must pay for the time spent. If I can do something faster and at a higher quality it is fair then that my price can be higher which allows me to add value in other ways. WorkPool helps with this as I can see on jobs are running at a profit or loss. If I’m are running at a loss then I can see why, re-evaluate things with the client and then correct it. Or adjust the price going forward.