

Cosec software you can trust benefits both clients and practice

Finding company secretarial software they could rely on has expanded the range of client services for a growing accountancy practice in the Midlands – and it works perfectly alongside existing software too.

For husband and wife partners of RD Accounting, Richard and Jessica Dunkley, a meeting with the Inform Direct team at Accountex Summit Manchester resulted in a major change to the way they approached and handled cosec work.

"We're happy users of TaxCalc for the other services that we offer, but were interested in finding a dedicated company secretarial solution that would streamline processes and allow us to offer more to clients" explains Richard.

Immediate benefits

"By taking the one month free trial, we discovered how simple Inform Direct was to use and the great additional features and benefits it offered. We also saw that this would work perfectly alongside TaxCalc without entailing any extra work.

"Inform Direct carried out a bulk import of data for our 150 limited company clients, a process which served to highlight and correct any minor inconsistencies held in the data at Companies House and might have needed more time-consuming unravelling further down the line."

For Jessica, the easy process of getting started confirmed that they had made the correct decision. She says: "I was up and running straight away. From day one, Inform Direct was intuitive and easy to understand so I could complete real work for clients. Getting started with Inform Direct was a quick win to improve our practice and service offering and such a nice change from buying software where it's a big project before you get any benefit.

Added value for all clients

"What particularly impressed us was that Inform Direct provides benefits for all our clients, not just those with more complex company secretarial needs.

"The process of filing confirmation statements, director and PSC changes and share transfers and allotments is so much quicker and easier on Inform Direct. We can customise and automate while still retaining control.



"We find it really helpful that the company registers are automatically updated whenever we make changes on a company. You can see who owns what and produce an up-to-date register of shareholders with just one click.

"And we love all the compliant document templates. There is literally one for every document you could ever need and they're automatically produced when we make changes. They look great and provide a wonderful extra benefit to give our clients.

"Email reminders bring reassurance that we are always on track. With all the information for our clients available at a glance, it's so much easier for us to manage workload, and gives Richard and I a holistic overview.

Taking on more cosec work

"Company formations have been another major area where it has delivered so many benefits – the process is so easy, fast and flexible – and importantly there's no need to re-input the same data. Documents are populated and produced automatically which not only saves time but reduces the risk of errors.

"A great benefit for our practice has been when we're asked to undertake more complex transactions, such as share capital reorganisations. We used to sometimes turn away this type of work as it was time-consuming and not straightforward to carry out. In Inform Direct, it's quick, simple, and with excellent documentation produced automatically.

"We also have access to support from the team of cosec experts whenever we need it. Initially just Richard and I were the main users, but our team of eight are now harnessing the benefits too. Increasingly, that helps us to empower our staff and frees up our time, safe in the knowledge that we maintain control and compliance.

"At the end of the day, knowing that we have reliable software we can trust means we are now completely confident to offer a comprehensive cosec service in-house. It operates perfectly alongside our existing software, makes us look more professional, adds value for our clients and expands our range of services too."