



APS Case Studies

Menzies

Menzies Migrates from UNIX to Microsoft to Manage Client Relationships and Bill More Effectively

Menzies Chartered Accountants was reliant on its old UNIX based system to produce reports essential to its work. The system was difficult to use and this was hampering Menzies' ability to use management information effectively. This slowed down the billing process and meant the firm could not identify new opportunities very easily. It worked with Microsoft partner Advanced Professional Solutions Limited (APS) to implement a practice management solution based on Microsoft SQL Server 2000, which has increased efficiency and reduced the reporting process from days to virtually real time.

Situation

The financial services world is increasingly reliant on IT to ensure data integrity, accuracy, and effective internal and external communication. This is especially true of the accountancy sector, as firms work to ensure they deliver on clients' expectations and accurately record and bill for time spent on jobs.

Menzies was established in 1912 and has grown successfully to become one of the Southeast's leading accountancy firms. Menzies prides itself on delivering a local business service through its network of offices so that it can ensure it can offer the same level of service traditionally associated with smaller firms. The firm incorporates a number of divisions, besides Menzies Chartered Accountants, including Menzies Outsourcing, Menzies Corporate Restructuring, Menzies Enterprise, Menzies Corporate Finance, CCL Menzies, and Christopher Martin Associates.

The chartered accountancy firm was using an old Unix-based practice management system, based on Unify 2000, which held data on fees recorded, work in progress, along with client data. But the system had been in place for 15 years, had become difficult to use and Menzies was finding it difficult to obtain the reports it needed quickly or easily.

Salvador Amico, IT Partner at Menzies, says: "IT pretty much sits at the top of the tree for us. We have invested a great deal in our infrastructure over the last few years and have doubled in size as a practice. But the reporting process was taking too much time with the old system and I wasn't particularly happy with its ease of use. We had to request help from the IT department to pull off reports, which could take up to a day or more to action."

Solution

Menzies wanted to replace its legacy system with a modern Microsoft® Windows®-based system that could operate over a Wide Area Network (WAN) for 250 people. It also required the chosen solution to utilise Microsoft SQL Server™ 2000 technology.

After researching the market in 2001, and narrowing the choice to two solutions, Menzies decided to work with Microsoft partner APS and use its next-generation software, Advance Practice Management. APS was founded in New Zealand in 1991 and now has an international presence, with more than 19,000 users in key accounting practices and professional services firms worldwide.

Advance® Practice Management uses Microsoft SQL Server 2000 at its core, and deals with Client Relationship Management, time and billing, workflow, and management reporting.

APS builds its applications in a three-tier environment using Microsoft Visual Basic® 6.0 development system and COM+ components as the middle tier that talks to SQL Server.

The solution makes use of Microsoft Analysis Services, which comes packaged with SQL Server 2000 to carry out Online Analytical Processing (OLAP) to gain a deeper understanding of management information. SQL Server Data Transformation Services (DTS) enables this data to be easily extracted or loaded from other company databases and sources. Online Transaction Processing (OLTP) handles data entry, transactions and retrieval.

The Online Backups feature of SQL Server also helped with Menzies decision to opt for a SQL Server-based solution as it enables data back-ups while the database is still online, minimising business disruption. The solution can also seamlessly merge contents to Microsoft Word and Microsoft Excel.

Brian Coventry, Managing Director of APS UK, says: “We have a very good relationship with Microsoft though our development centre in New Zealand, so we keep up to speed with things as they change—and they change quite rapidly—so we can incorporate them into our solutions and ensure that our clients benefit from leading edge use of technology.”

APS migrated the data from the old system into Advance Practice Management and conducted a pilot with Menzies’ Corporate Restructuring Division in April 2002 with 40 staff. That proved extremely successful and the solution was rolled out to the rest of that division and the eight practice offices—a total of 250 users and 34 partners.

Benefits

High Performance and Scalability

Amico says: “We didn’t realise the benefits we could get when we embarked on this, we just knew it would be better than what we had. We could have upgraded the SCO Unix solution, but we certainly would not have had half the benefits we have gained as a result of moving to a SQL server based solution.”

SQL server is capable of handling a staggering 688,220 transactions per minute, according to TPC-C* performance tests. Menzies uses it to handle 5,000 transactions and 500 queries per month on average. The database is currently 1GB in size.

Ease of Use

Ease of use was a key priority for Menzies, as it did not want to involve the IT department in pulling off reports, which it was previously reliant on. APS trained the ‘power users’, who then passed on that knowledge to other users.

OLAP enables users to slice and dice information using multi-dimensional cubes. Users can also put reports in pivot tables so that the same report can be viewed by different employees from different perspectives.

Amico says: “Advance is very user friendly. Users can pull off reports and present them on any desktop in almost real-time. We weren’t in control of the reporting process before, whereas now we are. Advance is so much better than anything out there. The other system we looked at was far too complicated.”

Business Intelligence Discovers Missed Opportunities

Due to the nature of its business, Menzies needs to be confident about the reliability of its data, and the APS solution meets this requirement.

“Data warehousing and OLAP push the information to users on a daily basis so that they can see key performance indicators (KPIs) and immediately focus on areas where the business needs attention, rather than only becoming aware of the problem several days later. Advance® also ensures that the 30 partners can keep up to date with the health of the company,” says Coventry.

Menzies looked at how quickly it converted work in progress to fees and then fees to cash and now produces reports so that partners can see exactly how long it takes and if there is something that hasn’t been billed. This enables it to look at business problems before they become financial

problems and become much more efficient in the way it bills clients.

Amico says: “Now we have a much better idea of what is actually happening so we can identify problem areas and missed opportunities.”

Strong Partnership Delivers Results

The two companies have worked well together to achieve Menzies’ objectives and ensure that it continues to get maximum benefits from the solution.

“ What APS has done has made us much more efficient as we have a focus of where the business is going. We now have so many new tools that will help us serve clients—and if they’re happy, we’re happier. There is no one single part of this project that I would point out as being above the others, in terms of importance, as the benefits are universal to us.”

Competitive Advantage and ROI

Menzies is now in a very strong position to move forward, and has an infrastructure that will help it to remain competitive. As the 25th largest accountancy firm in the UK, the company continues to grow, and the flexibility and ease-of-use of the system will enable it to connect new offices and get new users up to speed quickly.

Amico says: “We got what we wanted out of the system and more. Whenever you invest in IT, the first question the people with their hands of the purse strings ask is what the financial return is in comparison to the initial investment. It is very hard to quantify the financial return of something like this, but it has undoubtedly helped us as a business. If we hadn’t made the change to a SQL Server-based solution, we would not be as efficient as a company and we may now be struggling.”

Foundation for the Future

“ We have customised report design, using Advance Practice IQ, and are just scratching the surface in terms of reporting. Before the system was just used for timesheet recording and billing, but we have now started to look at the other things we can do,” says Amico.

These future developments include entering client details beyond name and address, such as number of employees, age of employees, and so forth, so that the practice can provide better services to its clients and generate more revenue.

Amico says: “If we introduce a new product we want to know which customers it would be best suited to and how we can inform them. Let’s say that there’s a new piece of tax legislation. We want to be able to go beyond just sending affected customers a bulletin, we also want to communicate with them by email and text too.”

Coventry says: “Businesses, such as Menzies, cannot afford to be building a completely new infrastructure every three to five years so it is essential that they have the opportunity to invest in a business solution that is based on open standards so that it is easily integrated and fits in with existing and future technologies.”

http://www.tpc.org/tpcc/results/tpcc_perf_results.asp

Windows Server System™ is the comprehensive, integrated and interoperable server infrastructure that helps reduce the complexity and costs of building, deploying, connecting and operating agile business solutions. With the Windows Server™ platform as the foundation, Windows Server System

delivers dependable infrastructure for data management & analysis; enterprise application integration; customer, partner and employee portals; business process automation; communications and collaboration; and core IT operations including security, deployment and systems management.

For more information about Microsoft SQL Server, go to: <http://www.microsoft.com/sql/default.asp>

For More Information

For more information about Microsoft products or services, call the Microsoft UK Contact Centre on 08706 010100. To access information via the World Wide Web, go to: <http://www.microsoft.com/uk>

For more information about APS' products and services, visit the Web site at:
<http://www.aps-advance.com>

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