Practice Report
Discussion Document

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Who we met

IT RAG Findings

Key	
High-Risk Issues Identified	
Medium-Risk Issues Identified	
Low-Risk Issues Identified	
No Issues Identified	

T-TECH

Domain	Summary of Findings
Physical Assessment	
OS /AD Assessments	
Infrastructure Configuration and Maintenance	
Cloud Identity and Multi-Factor Authentication	
Microsoft Secure Score	
Email System Security	
Web Security	
Network Assessment	
Patch Management	
Anti-Virus Management	
Backup/DR Assessment	

IT Summary & Infra

Area	Comments
Hardware	
Performance	
Data	
Phones	
Meeting rooms	
Software	
Connectivity	

Applications

T-TECH

Area	Comments
Document management	
One Click	
CCH	
Xplan	

Processes 1

T-TECH

Area	Comments
AML	List in MS teams – communicate with Admin via teams. Services requested. Sam created msoft list from website enquiries – send reminders to people – have you made contact
Billing	Would like to have a recuring monthly fee – automatically in CCH. – Have to do it manually every month. Want it across client. Customers on direct debit – hard to do on CCH. Go cardless – another accounts system. Wanted a breakdown of statement – across four bills – took 30 mins to get the information, hard to trace. Legal: Invoicing – templates are rigid. Disbursements. Getting to show correctly – takes 5 minutes per invoice. – should be a button. Debtors takes a huge amount of time – “to not look like an idiot.” Take a whole day to prep, Monthly run would take an entire week. Statements stopped going out - Debt has risen Legal bills don’t get chased. “Clients calling to ask why chasing 7 month old bill” 600-800k outstanding bills. 280, over 6 months. Postal runs make a big difference.
Training	On modern aspects of work - Shared documents, collaboration Don’t know the best way to do things when new systems come out – don’t know how to use shared documents. Don’t know how to use two screens optimally “Word plays with me.” How many staff actually research how to do things in CCH?
Onboarding	Just developed a new system: Admin do when asked – monitor data in CCH. Legal and Tax will setup separate client codes for same customer Using MS 365 tools – create lists (internal) – smart search for AML Don’t have a quoting system
Workflow	Tracker spreadsheets – all client names – note if work has started Legacy workflow for personal tax prep, Don’t use central Tried to build but found it very restrictive, glitchy Had a massive play – reached a dead end. All work monitored by excel spreadsheets from CCH.

Processes 2

T-TECH

Area	Comments
Expenses	Printing out expenses on CCH, handed to Julian, then Paula. Some Rechargeable. (How is it identified)
Reporting	Deadline tracking – milestone chasing CCH report is the best we can get it. “It’s a bodge.” Report on CT payments. Hard to see productivity statistics
Timesheets	Some people don’t fill them out. A few rogues. Keep looking to see if it’s done. Generic email is sent to chase. Looking at power automate.
Misc/ Culture	Don’t have people who are sales motivated. Nobody wants to meet the new client. “If you’re not chargeable, you don’t count.” “Nobody notices the good things we do.” “Not people managers.” Everyone is empowered to do what they want to do. Discipline and accountability.

Departments

Department	Comments
Tax Department	
Accounts Dept	
Legal	
Financial Planning	
Admin	
Finance	

Practice Maturity

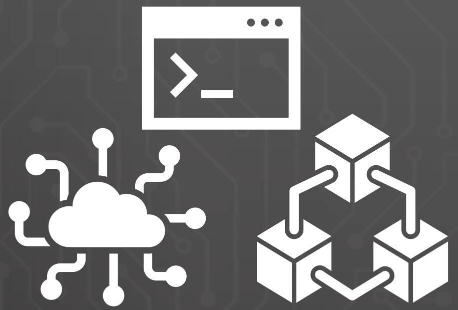
Good Foundations

- IT Leadership/ Board level representation
- Servers up to date and in the cloud
- Use of Office 365
- Quality IT Support
- Quality Laptops for all
- Cyber Security

Collaboration Tools

- Use of Teams for collaboration internally and externally
- Teams Telephony
- Cloud document management

Systems Integration, application optimisation, & process improvement

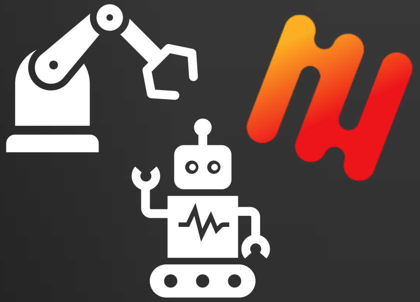


- Best of breed tools using APIs and connectors
- Application optimisation
- Integration plan

Analytics Internal and Customer

- Live Dashboards
- Automatic analysis of datasets

Automation, Robotics, and Digital Front Door (Practice Gateway)



- Imbedded automation platform
- Formal process for selecting automation opportunities

Maturity

Maturity Area	Attributes	Current position
1. Good Foundations – Cloud First		
2. Collaboration Tools		
3. Systems integration, application optimisation & process improvement		
4. Analytics – Internal and Customer		
5. Automation, Robotics and Client Portal		

Recommendations 1

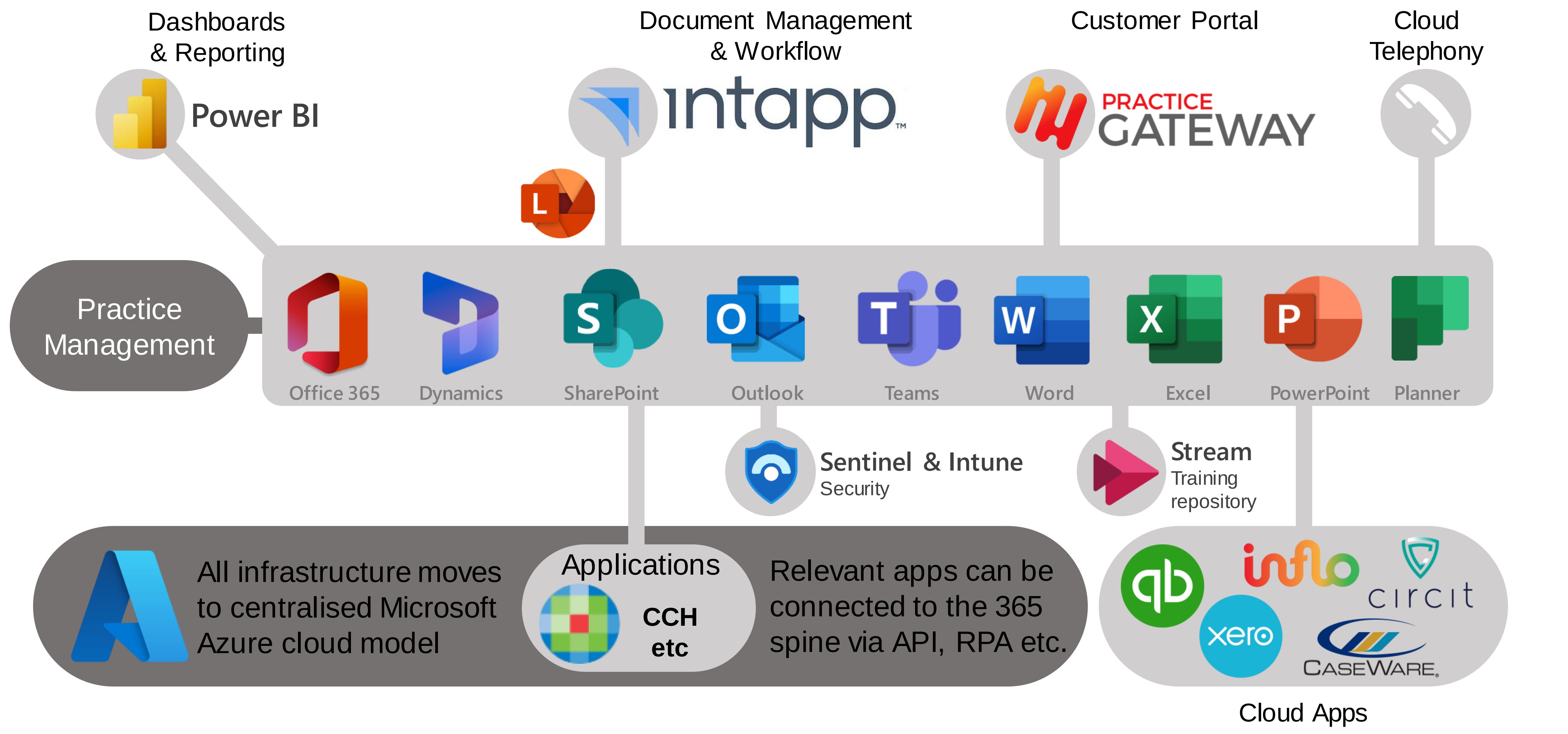
Phase 1

Phase 2

Departmental Flow through

	Accounting	Legal	Financial Planning
Document Management			
Billing			
Time Keeping			
Reporting			
Portal			

The Spine



T-TECH
Dashboards & Reporting
Power BI
Document Management & Workflow
intapp
Customer Portal
PRACTICE GATEWAY
Cloud Telephony
L
Practice Management
Office 365
Dynamics
SharePoint
Outlook
Teams
Word
Excel
PowerPoint
Planner
Sentinel & Intune
Security
Stream
Training repository
All infrastructure moves to centralised Microsoft Azure cloud model
Applications
CCH etc
Relevant apps can be connected to the 365 spine via API, RPA etc.
inflo
circit
xero
CASEWARE
Cloud Apps