

Accounting Firm Saves Time and Boosts its Bottom Line

By upgrading their outdated server and unstable network, this accounting firm's employees were able to process accounts in a timely manner and finally access their e-mail!

Company Overview

Founded 25 years ago, B J Grace & Co is a small accounting firm that specialises in accounting and taxation consulting for individuals and businesses. Its clients vary in size and cover a wide range of industries. The company needed to refresh its existing technology to streamline its daily accounting transactions. Its outdated server and poor Internet connection made it hard to conduct transactions in a timely manner. And its heterogeneous IT environment minimised information-sharing between employees.

Business Challenge

Communicating internally and with clients was a daily challenge. B J Grace & Co had just one e-mail mailbox. This was managed by the firm's director, who would receive e-mails and files from clients and then redistribute them across the firm.

Manually distributing this data was wasting a substantial amount of time and taxing the director's workload. The lack of personal e-mail addresses made it harder for clients to get in touch with the staff working on their accounts.

B J Grace & Co also lacked a centralised data repository; client data was stored on individual PCs. Without access to critical financial and transaction data, staff could not find the right information quickly and were unable to collaborate on documents or projects.

To manage basic network functions, B J Grace & Co ran a Microsoft® Windows NT®4.0 server that suffered extremely slow processing and data transfer speeds. The firm's Internet access speed was also painfully slow, which staff found very frustrating. It took accountants excessive time frames to download data from the Australian Taxation Office business portal.

With outdated infrastructure, staff were disconnected from the office and unable to access company systems when visiting clients. Lost productivity as a result of these factors made employees dispirited because it compromised their ability to deliver services to clients in a timely and efficient manner.

"Our IT environment was making us less competitive," says Andrew McSweeney, Director, B J Grace & Co. "We couldn't consult on new projects due to a lack of certainty that we could deliver on time, which meant we were losing potential revenue."

The company was also using legacy applications that were no longer used by its clients and business partners. An application upgrade was in order.

Solution Overview

Customer Profile

B J Grace & Co is a small firm of certified accountants based in Brisbane, Queensland. The company employs four full-time and three part-time staff.

Business Situation

The firm's outdated server and unstable network meant employees could not process accounts in a timely manner. Financial data was not stored in a central repository, making it hard to access.

Solution

B J Grace & Co implemented Microsoft Small Business Server 2003 R2 Premium Edition to improve communications with clients and business partners and protect sensitive financial data. It also installed Microsoft Windows XP Professional and Microsoft Office Professional 2003 across its seven desktop PCs.

Benefits

- Noticeable revenue increase.
- Stronger staff morale.
- Richer client relationships.
- Improved efficiency and productivity.
- Increased data security.

Software and Services

- Microsoft Small Business Server 2003 R2 Premium Edition which includes Microsoft Exchange Server 2003 and Microsoft Internet Security and Acceleration Server 2004
- Microsoft Windows XP Professional
- Microsoft Office Professional 2003

"We work closely with regulatory bodies such as the Australian Tax Office and the Australian Securities and Investments Commission and we were having difficulty meeting the ongoing standards they set for communication and technology," says McSweeney.

Handling confidential financial data is the company's stock in trade. However, the firm wanted to improve its data security system and data backup processes.



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Andrew McSweeney
Director
B J Grace & Co



Acceleration Server 2004, which protects the server and the vital client data it holds from unwanted intrusions.

"Microsoft is the standard platform for our industry; we work with an extremely wide range of clients who all use Microsoft software and Windows-based third-party applications for specialised functions such as job costing," says McSweeney. "We looked into Linux and freeware applications but they just weren't compatible. We want seamless interactions with our clients and that means using Microsoft."

The implementation took three days and the firm's sensitive accounting and taxation information was transferred from the legacy server to the new system without a glitch.

Business Benefits

Noticeable revenue increase

Following the implementation of Microsoft Small Business Server 2003 R2 Premium Edition, efficiency improvements meant employees could take on more work, which they would previously have turned away. This generated significant revenue streams compared to the previous 12 months.

"Once the solution was implemented, our additional revenues were more than we hoped for," says McSweeney. "Now we are responding faster to our clients' needs and able to complete more jobs in the same amount of time."

Improved efficiency

Solution

In August 2006, B J Grace & Co engaged Rivercity Solutions, a Microsoft Partner and Small Business Specialist, to address the shortcomings of its technology environment.

Rivercity Solutions decided to completely overhaul the firm's IT systems and built a new environment based on Microsoft Small Business Server 2003 R2 Premium Edition running on an IBM System x206 server. It installed Microsoft Windows® XP Professional and Microsoft Office Professional 2003 across the company's seven desktop PCs to standardise the operating environment. Rivercity Solutions also upgraded the firm's Internet connection to broadband. "Microsoft Small Business Server 2003 was designed to meet the specific networking needs of companies like B J Grace & Co," says Jamie Powter, Sales Director, Rivercity Solutions. "Now the firm has file and printer sharing, a secure Internet connection and a centralised document repository that all staff can access."

Microsoft Small Business Server 2003 R2 Premium Edition combines a suite of server products designed for the daily operations of a small business. Part of this suite is Microsoft® Exchange™ Server 2003. It allows the firm to give all staff their own e-mail accounts. It provides secure remote access to company systems and e-mail for staff working away from the office.

Microsoft Small Business Server 2003 R2 Premium Edition includes a built-in firewall based on Microsoft® Internet Security and

A secure, central information repository and a fast Internet connection have made finding and sharing information much easier, saving staff valuable time.

"We deal with the tax office on a regular basis," says McSweeney. "In the past, it could take five minutes to access the right technical documents and then get to the relevant page. Downloading a large document could take an excessive amount of time. Now it is instantaneous. You click and it's there. You print it and it's there."

Individual e-mail accounts have greatly increased the efficiency of communication between colleagues and with clients and partners. Remote access gives staff secure access to company systems and e-mail while working offsite or visiting clients.

"The technology we have now is a quantum leap in terms of how we can conduct business," says McSweeney. "Having more efficient tools to do the same work makes our jobs faster and easier. Working remotely is a big step for us and we are pleased that we can respond efficiently to any situation, no matter where we are."

Stronger client relationships and improved morale

B J Grace & Co now has the tools it needs to present a more professional image and manage customer relationships more effectively.

"In our game, instantaneous access to information can make or break a business decision," says McSweeney. "We now have the ability to produce financial data very quickly, which our clients appreciate."

"If a client rings me, I can bring up their information and transaction history from the Australian Tax Office portal on-screen and offer advice on the spot. It's just brilliant."

Day-to-day communication is less stressful because employees now have faster and more secure access to shared files and Internet services.

"Accessing data from the server now takes microseconds as opposed to seconds," says McSweeney.

"This might not sound like much but, over the course of a day, slow access to data has a very wearing effect on you. With the new solution we've removed this debilitating cumulative impact."

Increased data security

"Automated backups provide me with peace of mind that our critical data is secure," says McSweeney.

"We can pass this security on to our clients, who know their confidential information is protected."

"Microsoft Small Business Server 2003 gives me total confidence we are meeting our statutory requirements to keep our clients' financial data safe."

More Information

For more information about Rivercity Solutions products and services, call (07) 3844 0879 or [visit their website](#).

For more information about B J Grace & Co products and services, call (07) 3870 3511.