



⇒ What is Client Technology?

Technology plays an increasingly essential role in every business, but choosing the right solution to a business' unique needs can be a confusing and time-consuming process. Our Client Technology service has been set up to make this challenge easier, by offering expert advice to help determine and find the right solution to meet clients' needs.

By partnering with an independent technology adviser, Jeremy Hyman Associates, alongside our inhouse digital accounting expertise, we can ensure clients receive unbiased, bespoke advice, aligned with their business needs.

Key Services

1. Efficiency reviews, identifying which technologies can help clients improve processes and efficiencies and lower costs
2. Performance reviews, identifying where and how existing systems can be enhanced to deliver a better return on your investment, or where replacements might be needed
3. Assistance with the selection and procurement of new services and suppliers
4. Recovery of projects that have failed to deliver the expected benefits
5. Expert negotiations with new and existing suppliers to achieve better outcomes for you

⇒ How does this sit with our online accounting solutions and other services?

From our clients' perspectives this is all one solution to their technology needs. Some of these solutions are delivered by our Management Systems team headed up by Richard Woolgar, some of these solutions are delivered through Jeremy Hyman Associates.

In broad terms, our own Management Systems team will deliver Xero and Sage 50 implementations alongside integrations with apps and other systems, such as till systems and basic inventory control. For clients who require larger systems, such as Sage 200, Microsoft Dynamics etc. these implementations will be dealt with by Jeremy Hyman Associates.

Richard Woolgar is responsible for triaging all calls and is in regular contact with Jeremy Hyman Associates to pass the appropriate introductions to him.

⇒ How can we help businesses?

As trusted advisers we are uniquely placed to understand the needs of our clients. Where we as individuals may not fully comprehend the exact technological solution to assist a client's business, our close client relationships and knowledge of their operations, issues, plans and goals means we can help identify where efficiencies can be made and where technology solutions may help.

⇒ Why are we offering this service and why now?

Our role and our quest is to help our clients achieve prosperity, a secure future and peace of mind and adopting the right technology, deployed well, can ensure that businesses achieve this. The pandemic, and the subsequent operational problems surrounding it, have resulted in a vastly increased pace of change and necessitated a heavy reliance on technology, even for those businesses previously slow to adapt or adopt. Those that embrace these changes are much more likely to remain sustainable, be successful and grow, and in turn, remain committed to us as their trusted advisers.



⇒ What types of Technology are available?

Any type of business looking to utilise the following - or that you identify would benefit from the following – are ideal candidates for the client technology services:

1. Finance systems, from entry-level through to large ERP systems
2. Data management and analysis
3. Client care and client relationship management
4. Document management, portals & collaboration
5. IT strategic planning, project & programme management
6. IT resource and vendor management
7. IT operations, infrastructure and cloud migrations
8. Information Security
9. Training

⇒ What kind of clients will benefit from Client Technology services?

There is no specific type of business that will benefit most from this service, although those requiring financial software should first be directed to our internal onboarding team.

⇒ What kind of questions should I be asking my clients and what should I listen out for?

Things to listen/look out for when speaking with your clients:

1. 'It's taken a long time to prepare the year end financial information/records for us' – this indicates there are manual steps in their process which could be automated through technology.
2. There's some uncertainty with their stock figure/work in progress/sales differences/wages etc. – this indicates that they don't have a live system for keeping track of stock/work in progress, or that their systems don't "talk" to each other.
3. Your client has to recruit to replace one of their finance team – by finding out what this person does, it may be possible to avoid replacement and automate elements of the finance team tasks.

Questions to ask if the client hasn't mentioned any of the above. I would start the discussion by talking about how technology and automation is affecting all businesses and ask how it is changing theirs. Then steer the conversation to their financial/operational systems – asking whether their systems "talk" to each other and how much information is re-keyed within their processes:

1. Does your sales system "talk" to your financial package? Examples of this might include a separate system for generating sales quotes and invoices which requires re-keying of the information into the financial package. This could also include a till system/website shop/booking system/CRM where the sales are not automatically transferred into the financial package.
2. How often do your systems prompt you, rather than going to have to look for data – for example, to chase an opportunity or to reduce a risk?
3. How well integrated is your data? Do you store the same data in more than one place?
4. How easy is it to work from anywhere? How hampered have you been by lockdowns and what lessons have you learned?
5. For larger projects undertaken by clients, does their system group their costs and income according to the project? Examples of this could be construction projects / software development or any project with work in progress. If the client doesn't have a system for accumulating the costs and time spent on the project then there will be a time consuming manual system for capturing these costs to raise stage payments.



6. Does your stock control system provide a real time picture of your stock figure? If not then this suggests they might be using an old stock control system, by upgrading this they could save themselves time reconciling and recording stock movements.
7. How are your purchase invoices entered onto the system? If they are manually entered then manual data entry can be avoided and errors reduced by scanning purchase invoices which will be automatically entered into your financial system.
8. How do you work out which suppliers to pay each month? If pay-runs are completed manually and re-keyed into their financial software then these efforts are being duplicated
9. Are your bank transactions downloaded automatically from a bank feed to avoid every bank transaction being re-keyed from the bank statements?
10. Does their payroll system communicate with their financial package? Most payroll systems can be integrated with the financial software to prevent re-keying and errors.
11. How does the client chase in debts owed to them? If they don't issue statements and chaser letters automatically, then they could use a system which saves them a lot of time sending out these prompts automatically and scheduled times according to the age of the debt.
12. How do you stay in touch with potential customers/old customers? CRM systems can be used to issue regular advertising to your potential customers to generate sales.

According to the answers to these questions, the client may need to change their financial package, their other systems (such as till system/stock control etc.) or simply integrate their systems so they "talk" to each other. Depending upon the size of the business, this may warrant a complete overhaul of their systems and use of an ERP system which brings many of the elements described above into a single piece of software.

You don't need to know which systems are best for the client you are talking to... that's for the Client Technology team to determine, they will provide the right advice for your client.

⇒ Any Specific Sectors/Circumstances?

Whilst no sector is ruled out, there are some sectors that will benefit more specifically from our services and where we have had previous experience:

Professional Services

- Selecting and procuring a new managed service provider for a law firm with 40 staff
- Recovering poor service delivery from an existing managed service provider for a firm of accountants with 250 staff
- Selecting and procuring a new document management system for a professional services organisation with 750 staff
- Working with a firm of accountants with 80 staff to select and procure a secure system for sensitive communications with integrated e-signatures

Start-Ups

- Assisting a start-up business with the design of their new cloud-based software for servicing care homes around the UK
- Working with a start-up to build a new loyalty app for retail use

Training

- Training 250 staff, all working remotely, in how to get the most out of Microsoft Office and Teams



IT Strategy

- Working with a consortium of six businesses to select and implement a new joint workflow system
- Defining a strategy to centralise data, then turn that raw data into business information for a business with 800 staff across 8 offices
- Planning the IT strategy for a firm with 100 staff to modernise their internal systems and improve client communications

⇒ **How do I refer a client to Client Technology services?**

Contact Richard Woolgar on 07715 214751 or richard.woolgar@armstrongwatson.co.uk

⇒ **Who are Jeremy Hyman Associates?**

Jeremy Hyman Associates are a specialist, dedicated team who help firms make good IT decisions. They offer unbiased and independent advice and help clients choose and implement the most appropriate technology and resources.

Even though we have our own capable IT team, Jeremy Hyman Associates adds value to our business by helping to develop our long term Technology strategy and providing external oversight at board level. In the past, Jeremy Hyman Associates have helped us to run software and supplier procurements from identifying requirements through to sitting in on vendor beauty parades.