

Thriving firm streamlines processes to meet ever-changing client needs



Customer Profile:

Caplin Bookkeeping utilises its 20 years' experience in the financial services industry to support businesses with their accounts. The firm has grown significantly, with an influx of customers since being founded by Christine Aplin in 2017.

Overview:

When setting up Caplin Bookkeeping, founder and Certified Bookkeeper Christine Aplin wanted to offer her time and expertise to safely guide clients through financial complexities, providing them with more time to focus on other business-critical tasks.

Solutions used:

> Taxfiler

Challenge:

When Christine first started Caplin Bookkeeping, she was solely offering traditional services, but soon discovered to attract more clients she would need to broaden her offering.

She says:

"I wanted to provide as many services as possible because I didn't want to limit the clients I could take on."

Having been a sole trader herself, Christine was familiar with HMRC's software but she also understood its limits and how time-consuming it was:

"Factors such as not having the previous year on HMRC's software made processes significantly more complex."

Approach:

Once Christine determined her need for new software, she began searching.

She says:

"I went straight to other bookkeepers for recommendations, I thought who better to ask than the people using it every day."

"All companies can sell their products but when you speak to the people actually using it, you get their honest opinion and a lot of people recommended Taxfiler."

As soon as Christine began to look into Taxfiler and what it could do, she knew immediately the benefits and times savings it would provide when looking to cater to a wider client base.

"I knew having the right tool in place would make everything much more streamlined, enabling me to handle a larger workload and many more clients," she explained.

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Solutions:

Christine explained that Taxfiler enabled her to significantly grow her client base thanks to the wide array of services she could now provide.

"With Taxfiler, I'm able to download all the information needed to send across to clients for approval and submission, making my daily tasks so much quicker and easier."

Christine also found being able to connect Taxfiler directly to HMRC to search for employment records incredibly useful as it enabled her to quickly double-check details.

She says:

"When processing tax returns, you're reliant on the client to provide you with all the information you need. In the past, I've had those who provided a P60 while also working a second job which they didn't share any documentation for. Thanks to Taxfiler, when I ran my check, I was able to find the second job which made everything significantly easier and saved me a lot of trouble."

She says the support service Taxfiler provides has made a huge difference:

"The Taxfiler helpdesk is brilliant, if you send a query not only will an agent come back quickly but it will be a fully detailed response. They understand what the query is, give solutions and really work with you to get it solved if there is an issue."

Results:

One of the primary results Christine benefited from was the ability to do things quicker and for a much wider range of clients.

"It's definitely saved me time and made my life easier because as soon as I prepare a set of accounts to Trial Balance stage, I know the process to send a client their tax return or a set of accounts is so incredibly quick."

Also identified were quite a few areas where Taxfiler had not only improved processes but also played a key factor in managing compliance.

Christine says:

"Another area that Taxfiler has proved vital is VAT. When Making Tax Digital came into place, I was able to easily ensure compliance by submitting via Taxfiler which undoubtedly was a huge lifesaver."

Ultimately, the aspirations Christine had to expand her offering and attract more clients were met thanks to Taxfiler as it provided her with a streamlined solution that optimised her processes.

"Taxfiler is incredibly user-intuitive and easy to work your way around even if you don't have a lot of experience."