

Max Foote Associates

Chartered Certified Accountants, Registered Auditors and Tax Advisors in Somerset



Team Management, Timetracking, Client Deadlines and Invoicing System

Max Foote Associates is a firm of professionally qualified Chartered Certified Accountants that cover the whole of Somerset and beyond. Established by Max Foote in 1994 their clients include private individuals, sole traders, partnerships and limited companies. They also act for clubs, associations and charitable organisations.

Max Foote Associates pride themselves on offering a personal and professional service that includes compliance, auditing, tax planning and advice on all accountancy issues and they guarantee the highest standards of technical knowledge throughout the business.

The Evergreen Challenge

To provide a responsive and flexible **Team Management System** that will record and manage tasks, time spent and job allocation.

The Evergreen Solution

Evergreen developed a customised system that provided the company with the following benefits:

- Manage and track time in 6 minute increments
- Add instant communications and updates to client records
- Accessible by the whole team in the office and remotely
- Client analysis and reporting
- Project plan and manage individual client deadlines via a dashboard
- Visibility of task, time spent and individual workload

Existing systems were no longer supported

Sian Hill, FCCA, first approached Evergreen at the beginning of the year after researching suitable partners to provide a **solution to their technology issues**.

Sian explains, "At the time we were using two different systems – Sage Time and Fees and a manual spreadsheet system that we used to manage and allocate jobs and tasks. The Sage system was not compatible with Windows 7 and furthermore **was no longer supported**. We needed a cost-effective system that would combine both of these elements".

After coming up with a short list of potential solution providers, Sian and Max met with Evergreen and as they say "the rest is history".

"Impressed by the functionality of Evergreen"

Sian continues, "We were really impressed by the functionality of Evergreen's own website and quickly set up a meeting with them to discuss our issues. The team from **Evergreen are very professional** and spent time listening to what we wanted, our current issues and even provided working examples of systems so that we could see the potential for our own business".

The Evergreen solution provides **management reporting information**, statistics and analysis and has a built-in clock and task tracking system. Time is allocated on an incremental basis of 6 minutes to ensure client billing is as accurate as possible.

The whole team at Max Foote is able to **update individual client records in real time as well as having a record of calls and case progress**. Since its implementation, the system has quickly become an invaluable tool for both employer and employee.

"Cost effective, measurable return on investment"

The unique dashboard enables the team to accurately record time, offers visibility of tax and accountancy deadlines, as well as target dates for the completion of work.

Sian is delighted with the new system, "Initially we were concerned with two aspects of implementing a completely bespoke system – the costs and its functionality. Obviously there are generic industry systems available, but with the ever-increasing costs of licenses the Evergreen solution has proven to be cost-effective and with ongoing use will provide a measurable return on investment."

Talking about the issue of functionality Sian adds, "We worked together with Andrew to ensure the system would function exactly as we needed it to - Evergreen has provided on-going support and we have tweaked certain aspects as we have become more familiar with its potential."

As well as saving time, money and resources, the system has helped to **streamline office procedures and processes** and the feedback from the team has been great - all agreed that the system is easier and quicker to use than the previous set up and the information provided by the management system is accurate and relevant.

We asked the founder of the business, Max for his feedback, "I wanted a system that worked, at a reasonable price, and that is exactly what Evergreen have delivered".

"Recommended"

Sian has no hesitation in recommending a custom software system by Evergreen, she says "We feel it's not just for accountancy firms but for any business that is looking to achieve **greater control and visibility of team and work management**".

Sian sums up the whole Evergreen experience by saying, "Evergreen worked with us to make a potentially stressful changeover run very smoothly".

Click here to visit
maxfoote.co.uk



"The Evergreen solution has proven to be cost-effective and with ongoing use will provide a measurable return on investment."

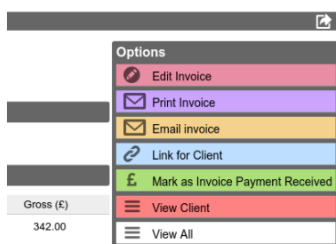
Sian Hill, FCCA
Max Foote Associates



WFP Codes	Task	Time Spent	Client
100	Initial Consultation	10:00	Client A
101	Review Accounts	15:00	Client A
102	Prepare Tax Return	20:00	Client A
103	Finalise Tax Return	10:00	Client A
104	Review Tax Return	10:00	Client A
105	Finalise Tax Return	10:00	Client A
106	Review Tax Return	10:00	Client A
107	Finalise Tax Return	10:00	Client A
108	Review Tax Return	10:00	Client A
109	Finalise Tax Return	10:00	Client A
110	Review Tax Return	10:00	Client A

"I wanted a system that worked, at a reasonable price, and that is exactly what Evergreen have delivered."

Max Foote, founder and Director
Max Foote Associates



Options
Edit Invoice
Print Invoice
Email Invoice
Link for Client
Mark as Invoice Payment Received
View Client
View All

Gross (£)
342.00