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“It’s brilliant.”

How a U.K. accounting firm increased efficiencies and grew margins with TAP Workflow Automation.

The Challenge

For a small firm, being able to manage the needs of clients may be even more critical than it is for a large firm. For Sherwin Currid, an accounting firm with fewer than 20 core staff based at its head office in Guildford, about 40 miles outside of London, they’re annually faced with managing the taxes of more than 1,500 companies and individuals, each with their own set of tax obligations.

That entails managing the regulatory requirements associated with different tax types and ensuring they’re met on time and in full. It also demands effective communication management with each client, while the firm also sought better ways of increasing efficiencies for each case, managing deadlines, and trimming time currently consumed by manual processes.

As Marie Hensfield, Commercial Development Manager at Sherwin Currid explains, “When we were looking for

a solution, I think it was really around how can we find some efficiencies? Because a lot of our clients are pretty similar small businesses. The same things come up time and time again.”

Who did Sherwin Currid turn to?

Sherwin Currid wound up adopting TAP Workflow Automation; and it delivered significant results very rapidly.



“What we’ve been able to do, thanks to TAP, is introduce a huge number of efficiencies,” Marie says. “Because rather than going back and forth on email – or dare I say by letter, which is somehow how some accountants still do these things – to obtain documents, we do it all through TAP, and we can see a job through from beginning to end.”

With TAP, visibility and control over each case becomes simple. “We know what stage everything’s at, we know how close it is to compliance deadlines, respectively,” she says. “Management is able to oversee where everybody’s at. So it’s really, really good for that, which obviously if you go in through emails and Excel, that’s just not going to happen.”

“TAP works really well for us because it brings together document management and e-signing.”

Other Tools in the TAP Toolkit?

Other features they’ve appreciated? “TAP works really well for us because it brings together document management and e-signing, since it’s nicely integrated with Adobe Sign,” Marie says. “So when we need to get the compliance documents signed by the clients, they can do that all within TAP. So it’s brilliant.” Marie continues. Moreover, TAP’s ability to automate reminder messages to clients relieves Sherwin Currid’s staff of doing manual follow-ups.

On another front, TAP helps automate information-gathering and collaboration with clients. “We wanted something where it would all be integrated in terms of the communication with a client on a matter...we basically designed within TAP, as part of those full workflows, various typical queries that we may have to send to a client. So we can just tick through which are the ones that we want to include in the workflow.”

Enabling More Effective Compliance

As accountants, Sherwin Currid is responsible for helping clients meet various compliance requirements, and “we use workflow automation for the more important ones,” Marie Hensfield says.

Some of those include submitting yearly financial statements to Companies House, the government’s registrar of companies, and submitting corporate tax returns to Her Majesty’s Revenue and Customs (HMRC).

“Bringing that (time costs) down has massively enabled us to increase our margins.”



Another requirement? Submitting Value Added Tax (VAT) returns on a quarterly basis, “and we use TAP to manage that,” Marie notes.

For accountants and their clients, compliance requires working through various stages, sometimes involving a fair amount of “back-and-forth” with the client. As Marie points out, “TAP enables all of that really brilliantly.”

The Biggest Benefit?

“Efficiency,” Marie stresses. “That’s key for accountants. Time costs are your number one overhead, so bringing that down has massively enabled us to increase our margins.”

A Singular Solution for Accountants

When Sherwin Currid first adopted TAP, there “wasn’t really anything specialized for accountants,” Marie Hensfield says, that was designed to deliver these capabilities.

Other providers have since tried to enter the space, but as she points out, “From what we gather - and we do keep an eye on the market - in terms of functionality, TAP gives us everything that we need.”

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