



# Customer Testimonial

## Company Secretarial Administration



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**Amelia Brand**  
Head of Department  
Company Secretarial Administration

### Administration

#### Why do you use WorkPool?

WorkPool is our “task management centre”. We use it to keep track of manual tasks, activities and recurring tasks. We also manage source documents through WorkPool and use it to perform our own pre-programmed processes. We can assign tasks to ourselves or to other people in the department, can see the status of any job/task that is in the system and provide feedback to the relevant parties. For me WorkPool is almost like Excel, but a big brother. Everyone can see what is going on, it monitors your daily schedule and you can track volumes.

We also use processes to structure our interaction with other departments. This ensures we are included and tasked at the right time on, for example, audits where we have a responsibility for the resolutions. We also have our own processes in place for other parties to request files, where these files have been barcoded and can be signed in or out. This allows us to track their whereabouts at all times.

#### Life before WorkPool?

There was no control! Like most other people we used Excel or an Outlook calendar to keep track of things. The problem with Excel is you can make a lot of mistakes or lose something by accident when you move a cell or refresh something. We needed a proper task management system, where everyone with permission can see what is going on and, most importantly, allow the “show to go on” when someone is absent.

Being in a management position, but also having my own clients to attend to, I knew that it was becoming more and more important to know which tasks my staff members were attending to, to monitor which tasks they’d started but not followed through on, and to avoid duplication of work so that two staff members don’t attend to exactly the same instruction.

When I started here many years ago there were 2 boxes full of paper with all the things we had to look at and do “when there was time”. We needed to check if the information was correct and, if we found any errors, to send it to Typing. But we had no way of knowing if something was sent to Typing or to the client. Or, when someone phoned to find out if a document was signed we had to physically go to the books and search through it. We created Excel registers to help, but that is very dangerous as you can shift or delete data by accident. In a list of 800 or a 1000 records you also won’t pick it up. We questioned the integrity of the data and didn’t trust it.

We also found that some people would exaggerate their workload but there was no way to compare workloads objectively. Someone would say “I received a lot of emails” and when you look into it, it in fact is only 3. This is in contrast to the person who feels awkward when they have “only” received 30.

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## Why did you choose WorkPool?

A couple of years ago I was about to go on maternity leave and was very concerned about how I was going to manage my workload. I wasn't sure how things would work without me as I wouldn't know what my team were doing. Fortunately a user at another company had introduced me to WorkPool two years earlier. I was very impressed by the live demo she showed me on her own system and how quickly she could access information while on the phone with a client. For instance, she could pull up a record, even before the person asked a question. She could almost predict what the person wanted to know just by looking in his folder. It seemed like it was a tool from the future! As there were only three people in our department at that time it was still more or less manageable to ask around to get updates. However, when I went on maternity leave for 4 months my requirements became very real and I knew I had to make a plan or else there would be issues. So the office manager and I set up a demo with WorkPool to compare our requirements. We saw that there was an opportunity to also control the Annual Financial Statement process through WorkPool's custom processes, which, as it was very manual at the time, was the biggest attraction for us. WorkPool was a good fit and we committed to the implementation. Since then we have never looked back. I don't know of an equal to WorkPool or how other people cope without it. The audit side of the business is now the biggest user of WorkPool and develops most of the processes and reports.

## What were the implementation challenges?

On a technical level there was a challenge to set up a link between WorkPool and Greatsoft, our other system. We did not want to duplicate information in WorkPool so we needed them to "come to the party" to share the information in their system and could pull it in for us to use in WorkPool. This was not just a requirement for us but for the rest of the business too. Now this is working fine and information is shared both ways between the systems.

On a user level the main challenge was to break the habit of making notes and adding their own reminders elsewhere. I am not someone who changes easily but I realised that I had to go with a soft approach and do a "sales pitch" to my staff to get them on board. I had to coach them a bit and I made them part of the process so that they could give input and come up with their own ideas. After the training I used daily and weekly reminders to prompt them to add work on WorkPool and shared all my own tasks on it. Initially we didn't always know what was allowed on the system or if we were doing it correctly. So we just made a decision to do the best we could, but soon saw the light as well as new opportunities like managing the signatories. With new staff it is easy as I am on their case. When we started our priority was to sort out the internal communication first. But once everyone was on board it got easier and picked up momentum which allowed us to move on to other things.

## How has WorkPool changed the way you work?

WorkPool has taught us to better systemise our own department. For example, we now file things in a folder per client after seeing how WorkPool manages its information. It is very visual. We don't upload a lot of documents on WorkPool, but when we receive an important document like an instruction, we attach it or email to the task. That way no one wonders about the credibility or source of the information. But we don't overkill it. My department has mastered WorkPool and we use mostly manual tasks because of the various types of work we do. There are basic principles that users must adhere to but not specific rules on how to manage their work so they can still use their own initiative. That said, we see more and more the value in processes and will be adopting more of this going forward.

There are so many small things that we need to do and remember on a job. The order of actions may also vary and there are often exceptions. Even the most experienced person makes mistakes and cannot remember everything when a check or condition only applies once in every 100 cases. If you consider the Section 45 of the new Companies Act for instance it has huge implications for us so we need to ensure that all the steps are followed and checks and documents are in place, of which there can be many. To train someone new is a huge task and we cannot assume something is common sense - even if you have years of experience. Of course I am scared people may rely on the processes too much and stop thinking. But our company is just getting too big and the risks too large if we drop the ball.

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## How has WorkPool changed the way you work? (continued)

Like most companies in our line of work there is often friction between the Tax department and the Secretarial department and we were no different. However, with WorkPool something healthy happened: we have actually had to put our heads together and recognise each other's strengths and how we can help each other. Our departments now design our processes together! If we pick up that there is a yearend change for example it now kicks off a task on their side to inform them. Working together also removes any emotional or negative feelings that may exist due to small or petty things and still allow the communication to flow between individuals as it should.

## What benefits have you derived through the process?

- The show goes on without you. With WorkPool things can continue even if someone isn't there or leaves the company.
- Our efficiency has increased significantly! Clients are often impressed and compliment us on how we know what is going on and who is busy with what. I am not convinced clients stay because of loyalty. Some do, but for me it is about speed, service and pricing.
- WorkPool allows us to track and manage the workload better and more accurately based on the type of work and the level/grade of complexity. This also helps us measure productivity and volumes. There are many risks in doing what we do and staff often focus only on the big things. But it is in the small things where our risks lie the most. WorkPool helps us to manage this.
- It is important for us to know which resolutions are still outstanding and whose signature is still required as an outstanding AFS resolution poses a risk to the firm if the audit of the next year proceeds without the prior year's being duly signed. With WorkPool we can track and see in real-time exactly which resolutions are still outstanding per individual and also make sure that we get any other administration for other entities done at the same time when the partner or one of us meets with them.
- We are better at documenting our activities. For instance, when one of our previous staff left the company, the other people became quite frustrated because her handover notes on WorkPool were not very clear. They could see and experience for themselves the importance of why things must be documented correctly and that initial frustration turned into a positive result as people started improving their notes with an understanding as to why it was important and that information must be useful to others.
- WorkPool helps us with industry reviews like IRBA. We can do sampling, identify the risks and get all our records in order. You press a button and you have the information. In the past it would take weeks to page through everything, searching.
- Barcoding the statutory documents helped us a lot. We charge clients an annual fee for storing their records as office space is expensive. We cannot charge a fee for something and then lose the document. When they phone and ask for a document we need to be able to help them quickly. We have 200 staff so it is easy to lose a document. Now documents are checked out to authorised people only and tracked. From a cost saving perspective this was a big thing and it helped us with risk management.
- Every week we look at each person's "opening balance" and "closing balance" on their tasks and check for important due dates. Like many people we are often good starters but don't always close off tasks as quickly as we could, mainly because we have to wait for other parties and follow up or other things take priority. At the end of the day we are here to make money and that is the culture we want to encourage. This means completing things properly and quickly. With WorkPool we can control the throughput of work.
- We use WorkPool's email templates to ensure everyone's email communication is consistent. It makes it so much easier as it saves time and we don't have to think about it.

## What do you like most?

The WorkPool guys have a lot of vision. They know what works. When we say we want “X” then they will give us advice on what the consequences and knock-on effects will be elsewhere. That is very reassuring for us and for me. It’s almost like they do business planning and consulting with us and help us with risk management. It is nice that I can quickly plot an idea and then run it by them. I know the Tax department has also changed the way they document things based on WorkPool’s direction.

I like the recurring tasks the most, and that you can create child tasks. For example, a testamentary trust will state that when a beneficiary turns 30 he must receive his first payment. We used to track these future payments in Excel, but we converted this to recurring tasks in WorkPool that are due in the future. Now we don’t have to track it or keep a list anymore because it kicks off automatically a month or 2 before the time. It is so handy. I also use it for birthdays, staff appraisals and tracking my own (personal) annual events. For clients we track their annual returns and also to deal with exceptions like special invoice requests. Before recurring tasks, I would take on most of the important work myself. It felt strange to let go, but now it is nice and I’m comfortable with it. It’s allowed me to empower staff.

We don’t run our emails through WorkPool at the moment. If we did, it would make life a lot easier and also allow us to see all the client communication, which is a gap for us right now. For some reason people are protective over their emails.

## Planning for the future?

Volume is a killer. It doesn’t matter how good you are. You need to get things done on time and prevent penalties. If you cannot manage things properly it will break you. One must almost be careful not to over administrate. Each person manages their tasks in their own way. With WorkPool you can still do this, but in a way that also meets the needs of business.

Company secretarial has changed a lot over the last few years and has become more specialised. In many ways it has almost become similar to the job of a lawyer where you need a lot of experience to do your job properly. Many of the documents we prepare are signed off by lawyers as is. In the past the work was mostly easy and predictable, e.g. appoint directors, do a shares transfer, register for VAT, etc. and this what most staff would do. New legislation has changed this. We now have a lot of responsibility so need the control and visibility across groups to track and implement rules. I cannot imagine where we would have ended up with all the red tape in our industry without WorkPool.

