



# Customer Testimonial

## Practice Management Solution



*“ WorkPool is brilliant! I would definitely recommend it. ”*

**Linette du Plessis**  
Office Manager

**Accountants & Auditors**

### Why do you use WorkPool?

Our company's core focus is audit: We typically start with an audit, then need to know who is busy with what and its status and track the field work, resolutions, tax returns, etc. WorkPool helps us know where everything is in Greenwood. It also ensures our people are responsible and everyone knows what they must do, when they must do it and why. It takes the manual factor out of things, which makes everything so much simpler and more predictable.

One of our biggest challenges with our type of work is write-offs where someone starts with something but doesn't finish it but keep booking time against it. WorkPool helps us identify early on when something was supposed to be done, but hasn't been finished yet. We also use WorkPool to update our time and billing system and close tasks on that system so people cannot log more time against a job when they are finished. This helps us better manage costs, write-offs and reduce mistakes.

### Life before WorkPool?

Very manual! This was very time consuming and difficult to track its status. In the past we had to complete a piece of paper for every partner to keep them informed of what was going on and keep track of the status of actions. If one person did not sign off on something it would result in follow-up actions or checks. Now the partners can track the progress for themselves. They have even taken on some of the planning with their teams because they can see what is going on. It also helps the partners' PAs be more involved and take care of some of the administration. Where partners used to ask us why something isn't happening they can now ask their PA. This has reduced the pressure on the work in progress manager as everyone could see what is going on.

When something "drops through the cracks" I had to investigate, starting with tracking down the financial statements. We only get paid when the financial statements are complete, so when we start a job we estimate what something will cost the client e.g. R10,000. When 3 months later our costs are R30,000 and we are still not finished,, we don't know why or what happened. Was it because the statements took too long to compile? Was it because we waited on the client, etc.? This was time consuming and sometimes it was too late to do anything about it.

It was also my responsibility to report on how long it takes for a set of statements to come in and be completed. Or how many did we complete per period per partner, how many balance sheets, etc? This was a very manual process and took us 3 days to do statistics. Now we click a button and it is available in real-time or a few minutes.

In the past we had a thick folder for each clerk ("box files") and we had to regularly follow-up on their progress find out its status. Whatever they said, we had to believe as we couldn't see or track what was actually going on. People would say that they had handed in the statements for balance sheet typing 3 weeks ago, and the typing department would say they knew nothing about it or never received it ... WorkPool helped us make people more responsible and accountable. We can now see exactly where something is, or is supposed to be.

*Continued ...*

## Why did you choose WorkPool?

We were introduced to WorkPool via our company secretarial department who was looking for a solution and it was highly recommended by another company. We did our own research, phoned around to ask other auditors how they keep track of things, but everyone said they were doing it manually or using Excel. We did not want to build a custom system as that would mean we had to start from scratch and maintain it. Since starting with WorkPool a few years ago, other software vendors have been promising us they can do the same thing - but they cannot, not to the extent that WorkPool can. They have other ideas of tracking and workflow and it isn't customised like we work. The fact that you can change and tweak WorkPool the way we wanted to played a major role in our decision, because we do things in a unique way.

## What were the implementation challenges?

Change. This was the biggest implementation challenge. We had to force people to use WorkPool as they tried to "jippo" it, didn't want to use it or were scared of it. We also decided not to capture historic data and included only a little bit to get started based on activities or jobs that were going on at that stage. We had a lot of clean-up and catch-up to do initially to bring the system up-to-date with what was happening in real life. We had to be stricter for a while, but we put our foot down and made someone the WorkPool police to check that people were doing what they should be doing. Some people liked it and changed over quickly; others took longer. The clerks, as it's their first job, didn't always "get it" initially and tried to "jippo" the system. The secretarial department got on quite quickly. Tax took a while as they aren't big on change.

This challenge was not unique to WorkPool however as we also implemented another system change at the same time and had the same issues. Now we don't have those problems as people are used to it and new people use it from the start. They know it is part of what they must do. You get some rebels but you deal with them and if they don't change their ways you have to take action.

## How has WorkPool changed the way you work?

We are much more systemised and information is more readily available. We used to be very manual, and compiling reports took a long time. Work in Progress, Deed searches, Travel Advances, etc. - everything was a manual process - paper driven - and things would go missing. Now if someone asks, "Why has my money not been paid yet?" it is very easy to tell them why. Or, if they ask why something hasn't been done yet we can tell them it is because they owe us money. Something like a "stop credit facility" is very easy to do now because when you start the process you can see they owe us money. Things are much more visible and trackable.

## What do you like most?

Recurring tasks! There are some things that must happen once a year. I had to document these somewhere and keep track manually, but now it is all in WorkPool and I know it won't go missing. I can also assign recurring tasks to other people to remind them of commitments. It helps me a lot that I can assign tasks to other people because I know I've done it and they cannot mark it as complete unless I am happy with it. When I know there is something we struggle with, or certain people who need to be reminded of something, then I just log a recurring task for it. Even if it means I make a task for myself and follow up with that person, it won't go missing.

## What benefits have you derived through the process?

- We would have had to appoint at least one more admin person if we didn't have WorkPool so we are saving a salary of R10k to R15k per month. One person can now do the job and also have time to do other work.
- When someone resigned we didn't necessarily need to replace them as we are much better at job allocations now. If we didn't have WorkPool we would definitely have had to employ more staff to do the same workload.
- Managing feedback is simpler. We can look at a clerk's WorkPool and you know exactly what is going on. We can pick up if someone is scheduled to start on a new audit, but still have too much work to do which impacts their delivery.. And we can see when someone is waiting for something but can't do anything about it which presents a gap to take on other work. People take a lot less chances and communication is clearer.
- Reports help us to keep track of progress, timelines and exceptions so we can take action when things are not happening within the standard timeframes. This helped us solve our workflow issues where clerks were dragging their feet or where I didn't know what they were busy with.
- When the regulations changed it complicated matters and increased the work we had to do. At that point we were already on WorkPool and could manage it. We know that when we make a rule, people will follow the rule because the process drives their actions.
- We save a lot of time on reporting and some reports have fallen away as the partners realised they don't need anymore. I used to compile Tax lists manually which took me at least 1 to 2 days. Now it's available at the click of a button and I can email it to someone.
- WorkPool helped us uplift the general technical level of people who were not very technical or were paper bound. We're actually at the point now where we do write-offs online and the partner does it themselves. WorkPool was the start of this changeover.
- We addressed communication issues with clients. For example, the Tax department would receive a resolution and pass it on to Secretarial, but there was no communication around this. Now we can deliver documents to the correct person immediately. Resolutions don't go missing anymore. If Tax receives something and they see it is for Secretarial then they can give it to them immediately. We removed steps and admin because it tracks everything and confirms when someone receives something. The need for communication has also reduced because there isn't the same need to follow-up and ask questions because you can see what is going on.

## Future plans for WorkPool?

At the moment we use WorkPool mainly as a tracking tool. The biggest thing holding us back from using more of WorkPool is that we don't use its email function yet. Some people use it, but most are too used to Outlook. Using WorkPool's email function would be a good thing for us as we could then see all the email communication between people on the relevant tasks. In the end, we want one program that can do it all so that everyone's emails relating to a client are linked to that client's folder. We can still see many internal applications for WorkPool where we can see it will work and where we need tracking, but we take it slowly so we can deal with the change management. You need the commitment from the top to tell people they must do it.

## Would you recommend WorkPool?

Yes, WorkPool is brilliant! I would definitely recommend it. I often look back and wonder how we did something manually and I can say that if you take away WorkPool now this place will fall apart. It makes a big difference and is now so much part of our functioning that if I look back I wonder why we didn't do it this way before? Why did we struggle so long doing things the manual way, the hard way!

