



**TaxAssist**  
Accountants

# Talking practice efficiency with TaxAssist Accountants

“My staff and clients love using Xero”

Xero for your practice



# Introduction: TaxAssist Accountants



Based in West Yorkshire, Dave Forrester's practice is one of over 200 TaxAssist franchises in the UK, providing accountancy and bookkeeping services to small businesses and individual clients.

Since Dave started the practice in 2009, it's grown consistently and he now has a team of 14 working across four offices. "We've added a person a year for 14 years," says Dave. "Turnover-wise, it's always double-digit growth, and it's very much managed by the systems and the people that we've brought along."

He credits the practice's progression to getting the fundamentals right. "We're focused on investing in staff, systems and processes," he says. "I think if you do that, you end up with happy staff, happy clients and retention results."

**Dave Forrester**  
Director  
TaxAssist Accountants, Skipton

Dave has used Xero in practice since the beginning. *“When we started we were fortunate that we didn’t have a legacy of desktop clients because we were a startup,”* he says. *“It was a matter of choosing what was in the market at the time.”* Xero’s online accounting software appealed because of the bank feeds function, which automatically imports bank transactions, eliminating the need for manual inputs.

**“I still think Xero’s bank feed technology is the best out there,” says Dave.**

**“We built our internal processes around it and then migrated and pushed it out to our clients. Building out our bookkeeping function to then feed into annual accounts has been a big benefit to us.”**

Around 90% of the firm’s clients use Xero to manage their business finances, with the majority using Dext to capture receipts, bills and invoices. TaxAssist’s client base is mostly small businesses so these core tools are usually sufficient, though the practice will advise on other apps, such as ecommerce and online payment systems, where needed.



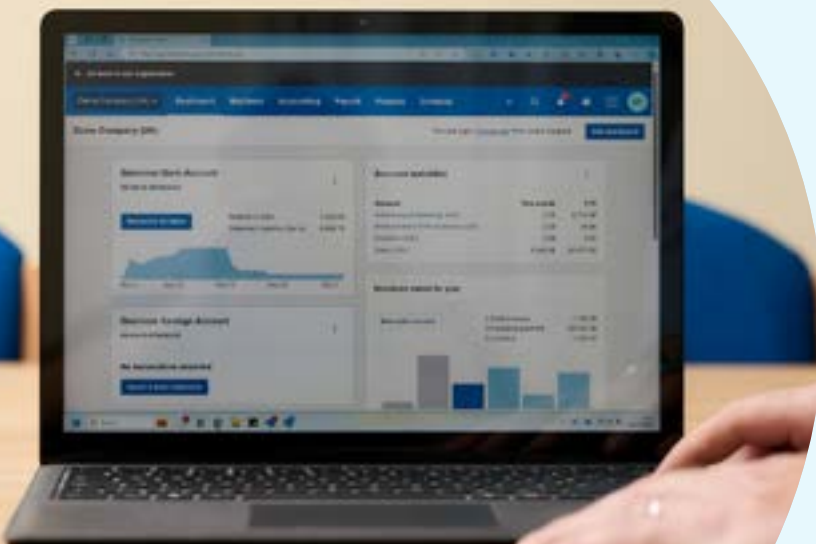
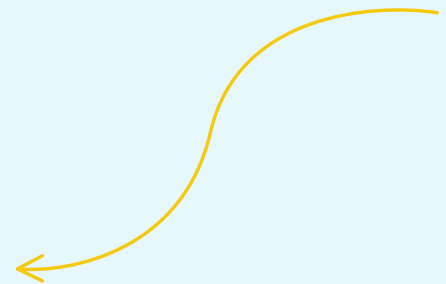
# Simple practice management

In 2012, Dave added [Xero Practice Manager \(XPM\)](#) to the firm's tech stack.

"We recognised that we needed a job and a time management system." The practice management software is available at no additional cost for partners at the silver tier or above on the Xero partner programme and makes it simple to assign jobs and tasks, track and invoice time and create customised reports.

Xero integrates with a huge variety of third-party software and apps, and the practice also started using [Ignition](#): software that automates proposals, client agreements, billing, payment collection and workflows. "There's a really solid integration between those two products," says Dave. A more recent addition to their tech stack is the cloud document and email management tool FYI. "That product has made a significant change to our workflows and our automations," says Dave.

**"With FYI you're bringing a front end onto what is a very flexible XPM database and you're essentially only limited by your imagination in what automations you can create."**



“  
**Basically, it works. We’ve not had to look at changing it or deviating from our plan, just enhancing it and incrementally making adjustments to things as we go.**”

**While recognising that new systems and processes can seem overwhelming at first, Dave says the benefits outweigh any initial challenges.**

*“With any system, you’ve got to be prepared to invest the time and really think about what you want to get out of it. With something like XPM, you need to understand how it interacts with Xero and how it might interact with products like Ignition. But if you get all those things singing in the right way, you’ve got really good information about your clients.”*

Xero is designed to be as intuitive as possible. There is 24/7 online support available, but Dave says a sign of its success is how rarely he’s needed to use such support. *“Over nearly 15 years I can count on my hands the number of times I’ve raised tickets,”* he says. *“Basically, it works. We’ve not had to look at changing it or deviating from our plan, just enhancing it and incrementally making adjustments to things as we go.”*

Another way he knows the technology is doing a good job? A happy team. *“If our staff are using a product and they’re not enjoying it, then their jobs are worse,”* says Dave.

**“If you look at Xero my staff enjoy using it and the vast majority of our clients enjoy using it.”**

By automating bookkeeping and accounting tasks and streamlining their workflows, Xero allows accountants to focus on other areas and grow their business. For Dave, that means taking on more transactional work, but also offering more management accounting and advisory services to existing clients. *“I always found that work quite difficult to do without a really solid, reliable platform,”* he says.

**“By having that bookkeeping process in place with Xero, we can increase our service levels, give clients additional services and charge for them.”**



# An ongoing digital journey

**The next thing he's hoping to add to the practice is Xero's end-to-end accounts production and tax software Xero Tax, which connects to bookkeeping data to streamline compliance work.**

*"If we can bring Xero Tax into our current app structure, we would have a genuinely integrated one-database approach," says Dave. "It would complete our practice software."*

Aside from that, it's about looking for ways to maximise the potential of their technology to simplify processes and improve client experience.

*"We've got automations for prospecting, onboarding clients, bookkeeping and a few simple ones around keeping in touch with people," says Dave. "But we want to build out more specific marketing."*

**My vision is that every piece of information clients receive, whether it's selling them something new or it's providing them with advice, is really valuable to them."**

If he had to start his digital journey all over again would he do anything differently? *"I think I would have worked harder on segmenting my clients from day one so we could build more niches. Apart from that, I'm happy with how everything's gone – and we're still growing."*



**Find out how Xero's integrated software,  
innovative practice tools, thriving community,  
and on hand accounting experts help increase  
efficiency so you can do more**

