



# Talking practice efficiency with PJE Chartered Accountants

“You can’t give clients added value unless the efficiency is there”

Get started with Xero



# Introduction: PJE Chartered Accountants

**As a platinum Xero partner, PJE Chartered Accountants – who operate four offices in mid and west Wales – are specialists in online accounting and the benefits it offers to both practices and their clients. But their transition to digital accounting didn't happen overnight.**

First set up in Lampeter in 1973 by Tudor Davies, the practice is now run by Tudor's son Gary Davies and grandson Llyr Davies, who joined the firm in 2018 and is now Director of PJE.

Operating in a largely rural area, the firm was a traditional practice until a few years ago.

*"When I started at the firm we were using Xero, but it was in a more basic sense," says Llyr. "We were using it for certain VAT prep jobs and a handful of bookkeeping clients who used the Xero product themselves. At that time I had responsibility for bookkeeping and VAT prep and it was something that we just didn't really make money on. That needed to change, and we wanted to look at improving client experience at the same time."*



**Llyr Davies**  
Director  
PJE Chartered Accountants

“

**We quite quickly realised that the automation tools that were available to us could make a massive difference to the way that the bookkeeping and VAT work could be completed. ”**

The first thing the firm did was to expand the use of Xero to all of its bookkeeping clients. Xero automates routine admin and compliance tasks, streamlining workflows and freeing up time to focus on other tasks. It is cloud-based, meaning teams can work together on the same set of financial data at the same time, from anywhere. *“We quite quickly realised that the automation tools that were available to us could make a massive difference to the way that the bookkeeping and VAT work could be completed, and we could actually start to make money on it,”* says Llyr.

Once the firm was happy using Xero for their bookkeeping work and automating tasks, they decided it was time to move all of their accounts preparation work over to Xero.

**“We got to a point where we had almost two different accounts production processes, one where we had this brilliant level of information because the clients used Xero, and then we had our traditional shoebox clients, and the accounts preparation process was completely different for both cohorts. So we took a leap of faith and got rid of the old accounts production tools, and decided to start doing accounts preparation on Xero as well.”**



# Why Xero is more than a compliance tool

**By doing all their accounts work end-to-end with Xero, the firm has made significant time savings.**

“Our productivity has gone through the roof,” says Llyr. “The difference between now and back in 2018, when we started on this journey, is absolutely huge.”

Xero also integrates with a huge range of third-party apps and software, meaning PJE could add on other products and build a technology stack to superpower their workflows. This includes Dext, software that extracts data from invoices, expenses and bank statements using receipt scanning technology, saving time and reducing errors.

And Xero’s online accounting software isn’t just there to make life easier for accountants and bookkeepers – but to help businesses, too.

“A lot of clients saw Xero purely as a compliance tool,” says Llyr. “If you’re the catalyst in changing the client’s view on that, showing them it’s also a business management tool and something that can help them succeed, that’s quite powerful. So once we had a handle on the VAT and the bookkeeping preparation work, we then looked at other ancillary products to improve that front-end process on the client side.” This included products like Xero Projects, Xero Expenses and Xero Payroll, as well as online payment services and inventory management tools.



# An intuitive and powerful ecosystem

**PJE were also early adopters of Xero's end-to-end tax and accounts production software. With Xero Tax data flows easily between books, accounts and tax returns, taking the pain out of compliance work.**

*"With the accounts production before we made this change, there were a lot of manual processes," says Llyr. "But Xero tax pulls everything straight from Xero. If you need to make a change, you flick to another tab or screen, make the change on Xero, and then you pull it back into Xero Tax."*

Xero Tax is available at no extra cost for accountants and bookkeepers on the partner programme to make it easier to file clients' personal tax and corporate tax returns. *"The process of running the information through Xero Tax and getting your CT600 and statutory submission for corporate tax returns is so quick and simple," says Llyr. "It's one of those things that would have taken such a long time before. You add that up for 1500 clients across the year and that's a big chunk of time. It's easy, it's intuitive, everything speaks to each other. Keeping everything within the Xero ecosystem is very powerful."*

In 2023 PJE acquired two firms, Kyffin + Co and Francis Gray. To ensure everyone is using the same systems each firm went through a migration process to convert to Xero. *"Inevitably, there are some initial pain points with migration," says Llyr.*

***"But when a colleague did her first set of accounts using Xero, she just smiled at me and said: 'Okay, I believe you now.' What the teams have been able to produce has been supercharged with the tools that we've given them."***





**“  
It’s easy, it’s intuitive,  
everything speaks to  
each other. Keeping  
everything within the  
Xero ecosystem is  
very powerful.”**



# Making time for a better client experience

**The efficiencies gained by using Xero mean PJE staff spend less of their time on routine tasks and compliance work, and more using their skills and experience to advise clients.**

“You don’t have the opportunity to provide the added value services to the client unless the efficiency is there,” says Llyr. “We all know what it’s like. If you’ve got a budget to hit and you have a £1500 accounts job, then you’ve got a certain amount of time to do it. If you can improve your efficiency and give yourself an extra few hours to do some critical thinking, give the client a phone call, have a proper accounts review meeting with them, that’s very powerful.”

Easy access to real-time financial data in Xero also means accountants can provide better insight and help their clients make smarter business decisions. “The quality of the information that we can provide has made a massive difference to the client experience,” says Llyr. “You’ve not only got a high-quality level of information, but you’ve got time to run through it with them. It means you’re going to build trust with the client, your relationship will improve, and they’re happier and more likely to spend money on some advisory services.

“For me, high performance is about providing those added value services to the client, not the bucket and spade compliance work – but you have to start with that first.

**With Xero at the heart of everything we do, we’ve made huge gains in efficiency and that’s what’s given us the platform to increase the quality of our service.”**







**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**

