

# A John Morris & Co. has streamlined efficiency by tracking resources & assignments with CCH iFirm



A. John Morris & Co., is a highly reputed Audit Firm with headquarters in Chennai and offices in multiple locations all across India. The Firm holds 25 years of rich experience in servicing clients from various industries such as Infrastructure, Motors, Construction, Engineering, Financial Services, Hotels and Restaurants, Educational Institutes, Textiles, Hospitals, Energy Sector and Retail Sector.

The Chartered Accountancy Firm, has 17 partners, over 25 qualified professionals and 50 articled assistants with expertise in areas such as Audit and Attestation Services, Taxation, Information System Audits, Project Planning, Finance and Control, Strategies for Financial Consolidation through Mergers, Acquisitions and Takeovers, Comprehensive Sector Wise Enterprise Resource Planning Solutions and Accounting and Finance Management Solutions through cloud computing.

“Typically a CA professional has to multitask; juggling multiple clients, sometimes from multiple cities, working on various projects at the same time. Thus, we, the partners, found keeping track of the jobs and monitoring the time spent by each resource on a job very challenging.” **shared G. Kumar**

## Need For Sophisticated Tracking

The Firm manages a wide range of clients across various locations. Thus, it is essential to maintain a certain standard of quality while meeting deadlines set on projects. This was possible only with efficient tracking of jobs and monitoring productivity of resources.

“Before CCH iFirm, we allocated Jobs manually. Even Timesheets were prepared on excel sheets for each of our 13 offices and then manually collated in one place to assess the productivity. But the reports always fell short of giving the partners a clear picture.” **said CA. Thenammai. AL**

“The jobs in a CA firm are of intellectual nature and therefore we cannot put a deadline to it. Having said that, it is essential to know the progress each job is making and if we are on the right track. This is where we realized the need for a software to help us track the jobs and manage our resources’ efficiency.” **said CA Yasmin Sulthana.**

### Firm Name

**A John Morris & Co.**

### Solution

#### CCH iFirm Practice Manager

- Dashboard
- Job Management
- Capacity Planning
- Work in Progress (WIP)
- Contacts
- Reports
- Invoicing

**Users : 100**

### Path to Discovering the Solution

A. John Moris & Co., were amongst the first few firms to adopt CCH iFirm. They were approached by the CCH iFirm team to appraise the product and help enhance its competency. Their inputs were taken into account to customize the product for them.

Once the partners at A John Moris & Co. had thoroughly evaluated CCH iFirm, the software was configured to fit their needs. This was followed by the training for selected partners and articles on modules of Contacts, Job Management, Capacity Planning, Invoicing, Reports and Dashboard which were simultaneously implemented.

“ We started off with 20 user licenses to gauge the effectiveness of the software. After three months of competent due-diligence and assessment of usage in terms of both quality and quantity, we decided to buy 80 more licenses. ” **said CA. Sanjeeve Narayanan**

### Key to increasing Productivity and Profitability

CCH iFirm enabled A. John Moris & Co., to centralize complete Client Information. Irrespective of the location of the partners, they can keep themselves informed about all the customer communication, from status of the projects, jobs attached to the projects, to the payment status and more, on a single screen.

The software also immediately allowed the Firm to streamline Jobs Management. This saved a lot of time spent in managing the activity through excel sheets. They were not only able to allocate jobs effortlessly, but also maintain a uniform workload amongst their resources. In fact, recurring jobs were allocated automatically.

Furthermore, with easily fillable Timesheets, managers were able to monitor the productivity of the articles. They identified the resources that were overworked and those that had idle time and redistributed Jobs to help finish projects on time and increase the billable hours per resource.

“Efficient capacity planning by accurate allocation of work has increased our productivity.” **added CA. S. Murali Kannan**

Another integral part of any CA Firm’s practice is Timely Invoicing. There is an agreed fee attached to every job allocated to a resource. Considering the multitude of jobs undertaken by the Firm, using the invoicing module became inevitable. The Firm used templates for invoicing which were generated within CCH iFirm on completion of jobs and straightaway emailed to the client, consequently giving the Firm a better control over its cash flows.

“ Now all the invoices are stored in one place where the entire process of debt collection and follow-up has improved. ” **added CA. K. Kannan**

The partners now achieved more effective insights into the progress of each project owing to the customizable Dashboard and perceptive Reports. These reports on cash flow and revenue, work flow, clients’ profitability, employee

efficiency and receivables plays a pivotal role in ironing out the weaknesses and up surging the overall performance.

### Operation integration is the Future

“ The integration of all aspects of our operations, such as Jobs, Resource Management, Timesheets and Invoicing, empowered us to look at the whole picture. We were instantly able to identify the bottlenecks and take the necessary action to improve our efficiency. ” **stated CA. K. Subhasree.**

“ CCH iFirm has become fundamental to our daily operations. It is the next generation cloud based software that has given us the power to run more efficiently and profitably. ” **concluded CA. G Kumar**

## Challenge

- Operations suffered due to management of related processes with various softwares.
- Managing and Tracking of jobs manually across multiple locations impaired the productivity.
- Capacity mismatch faced leading to unnecessary delays in completion of projects.
- Cashflows adversely affected due to delays in invoicing

## Solution

- CCH iFirm Practice Manager - Integrates all key business functions. The modules of Jobs, Capacity Planning, Invoicing and Reports enables the Firm to keep track of all jobs across the Firm.
- Resources are optimally utilized, client invoicing and account receivables are kept under control.
- Invoicing Module ensures that client information on invoices and receivables is up to date.

## Benefit

- CCH iFirm has enabled the Firm to manage clients, contacts, jobs, billing and debtors through one software.
- The integration of all aspects of operations resulted in identifying the bottlenecks and taking the necessary action to improve efficiency.



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under the practice management category