

## Saffery Champness

CHARTERED ACCOUNTANTS

**WEBSITE:** [saffery.com](https://saffery.com)

**USERS:** 800

**PRODUCTS:** The NetDocuments  
*Organise* Solution:

- DMS
- ndSync
- ndMail
- OCR



# Saffery Champness Uses NetDocuments to Support Its 'Cloud-First' Strategy, Enabling Staff to Securely Manage, Discover and Share Files From Anywhere

## About Saffery Champness

Saffery Champness is a top 20 firm of Chartered Accountants and Registered Fiduciaries. Operating for over 160 years, the firm provides a suite of services including accounting, audit and assurance, business advisory, corporate finance, forensic and litigation, outsourcing, tax, trusts and VAT.

## Challenge: Siloed Documents Negatively Impacted Productivity

Saffery Champness handles thousands of documents each day, each containing confidential information that assists clients with their accounting and financial reporting needs. Like many firms in the industry, Saffery Champness was using several applications to support various service lines (such as tax returns, and audits), many of which had their own document management functionality. However, these document management capabilities were limited and only worked in the context of the individual service line application. This meant documents became siloed, resulting in staff using email and folders to manage documents centrally.

“The categorisation of documents hadn’t taken place, which was impacting on internal productivity. Managing and storing documents within Microsoft Exchange just wasn’t a sustainable way to work,” says Julie Berry IT Partner at Saffery Champness. “This way of working posed a large amount of strain on employees’ email inboxes and time was often wasted working out who had what document, and where to find it. This resulted in time being spent to find the most up-to-date version, creating increased frustration amongst staff.”



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Julie Berry  
IT Partner, Saffery Champness



## **Solution: A Central and Secure Cloud Platform to Share, Manage and Collaborate on Documents**

To continue making its document and email management more efficient and to continue to deliver a great client service, Saffery Champness needed a central and secure platform to share, manage and collaborate on documents.

As a firm with a ‘cloud-first’ strategy, Saffery Champness was looking for a cloud-based document management system to enable greater flexibility and agility. “We are rapidly growing and needed a solution to support this, helping staff to manage their workload efficiently, whether they are working in the office or remotely,” says Berry.

## **A Cloud Platform to Support Collaboration and the Categorisation and Centralisation of Documents**

Saffery Champness evaluated several specialist document management solutions before selecting NetDocuments, which it believed offered the best package in terms of ease-of-use, flexibility and security. “Our top priority was finding a secure cloud-based platform to support collaboration and the categorisation and centralisation of our documents.

After evaluating numerous solutions, we were confident NetDocuments would provide the agility, flexibility and security we needed to deliver the comprehensive services our clients expect,” added Berry.



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Julie Berry  
IT Partner, Saffery Champness



“What made NetDocuments stand out from the competition is the overall user experience. We were impressed by the easy-to-use user interface and by how it mirrored the applications our staff use every day. We felt this was very important in getting employees buy-in to use a new system,” says Berry.

## **Working with a Small Window of Opportunity for Implementation**

When it came time to implement NetDocuments, the firm had a six-month window (April – October) to test and roll-out the new document management system, as it has to work around the tax season to minimise business disruption. Despite the short timescale, the project was delivered on time and helped Saffery Champness to onboard its staff. “The main challenges we faced when it came to onboarding staff, was getting them to break old habits. We had 800 people who were new to the concept of document management. However, through dedicated training sessions they were able to see the value it could bring to their work – such as the ‘saved search’ function which meant staff no longer had to waste time filing documents into folders and finding documents themselves.”

## **Benefits: Secure Anywhere Access, Increased Productivity, Improved Collaboration and Compliance**

Since implementing NetDocuments, Saffery Champness has improved collaboration across the whole organisation and its stakeholders. By providing a central and secure space in the cloud to hold and manage emails and documents, staff and partners can

collaborate effectively, increasing productivity and adding value to the work that they do. "We no longer have to spend a lot of time searching for documents across multiple systems, as we are now able to create fully searchable matter files for each of our clients, ensuring each document is in the right place and categorised correctly," says Berry.

Using NetDocuments has also significantly improved email management across the company. "With NetDocuments, staff are still able to use the applications they are used to, such as Outlook, and further regain control of their inboxes. NetDocuments has helped streamline work and increase productivity across the whole business," added Berry.



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Julie Berry  
IT Partner, Saffery Champness



In addition to improving process and efficiency, NetDocuments has also helped Saffery Champness enhance its security and compliance. "We now have the ability to share documents through secure links which not only reduces email traffic but gives us and our clients peace of mind knowing what we share is 100% secure. NetDocuments also keeps data protected across the organisation, helping to comply with policies such as GDPR by deleting information when we no longer need it," added Berry.

## **Enabling Better Work Life Balance for Employees**

Over 800 people, including Saffery Champness staff and partners are now using NetDocuments via desktop, laptop, mobile and tablet devices. "Enabling staff to access our documents from anywhere using their device of choice is becoming increasingly important, especially as working practices change. We think this is crucial for employee productivity and happiness as we look to attract and retain the best talent."

With NetDocuments, Saffery Champness now has a future-proof document and email management platform to support its growth, enabling the company to provide an enhanced experience to employees and clients alike.



## About NetDocuments

NetDocuments is the leading cloud-based document and email management solution to securely store and organise documents on a single platform. Backed by 20 years of experience in cloud innovation, over 2,750 companies worldwide trust NetDocuments to secure their data while increasing productivity and team collaboration.

Make the move to the NetDocuments cloud to get the speed, mobility, and industry-leading security companies worldwide are already taking advantage of today.

Contact us at **+44 (0) 20 3455 6770** or visit **[www.NetDocuments.com](http://www.NetDocuments.com)** to learn more today.

