

# CASE STUDY

# BAR TAX

## BarTax

### Background

BarTax is an accountancy practice for barristers. They believe in harnessing technology to streamline their practice and deliver outstanding service levels to their clients. Everything they do is underpinned by a traditional commitment to genuine customer care, led by the skill and expertise of their multi-disciplinary team.

As a leading accountancy practice to members of the Bar, their professional reputation rests on providing a consistently high standard of financial support to barristers from a nationwide team of experienced accountants.

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**Geoff Cloughton, Managing Director**

### Industry

Accounting

### Location

United Kingdom

### The problem

Geoff Cloughton, Managing Director at BarTax, told Mail Manager that three years ago, they were using Office 365 and having problems with Outlook when loading up, synchronising and accessing emails. The IT department believed it was due to the amount of emails they were holding within Outlook, with folders containing over 40GB of emails. Their IT Manager suggested the company should remove emails from Outlook and, also, after hearing about it from a client, made the recommendation to investigate Mail Manager as a better software solution.

Although there isn't any legal requirement for BarTax when it comes to filing emails, they ensure they hold records on everything that is sent out. As part of what they do, they give advice to clients and often have to access previous emails to review what was said. Geoff said: “It's not uncommon for clients to try and send penalties or fines over to BarTax, so accessing information quickly is necessary to prove the correct information was given.”

The system they had wasn't practical. They had folders for each client and within each folder there would be additional folders divided by years. Looking for previous information was very time consuming, however, after implementing Mail Manager they were able to create an easy and structured mechanism to store and find emails.

## The Solution

Geoff said: "The deadline to get tax returns in is the 31st of January and we often need to chase people up by sending 4 to 5 emails."

"With Mail Manager, we can easily access all previously sent emails on that topic, and mention 'further to our email below', which is a very effective way to get correspondence back quickly. We use Mail Manager a lot to refer back to previous emails and the sorting facility, that all the team has access to, allows the company to improve our overall performance."

As BarTax has a lot of part-time employees, it is common to have to check emails sent from other colleagues and, with Mail Manager, anyone can refer back to an email and assist a client, regardless of who sent or received the email. This has also resulted in drastically reducing time spent finding and sending relevant email communications to clients, as well as improving the service they can provide clients.

Geoff added: "It saves around 10 to 20% of staff time, improving efficiency from staff looking into emails, which means they can now respond on the call instead of having to search for information and get back later on, allowing the ability to work very quickly over the phone."

His favourite feature is the search facility, which allows them to find information fast regardless of being copied in an email. BarTax also find the simplicity of moving information around the software very useful, for example, when they have a new client, they move all marketing communication that was sent to the client folder within Mail Manager.

Geoff believes people have the incorrect assumption that emails can't have an add-on to make life better. But there is a better way of managing something that is so ingrained in business life. He said: "If it wasn't for our IT Manager, we wouldn't know we could do email better. Mail Manager does what it says it does. It elevates Outlook to a new level."

### Key benefits

- Improved staff efficiency from reduced time spent searching for information
- Significantly reduced storage issues from emails being stored in Outlook
- Reduced risk and improve client service from being able to instantly access information

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