



James Todd & Co Case Study

Technology to support business growth



About James Todd & Co

Accountancy firm James Todd & Co, based in Chichester, with three offices around the East and West Sussex region, has expanded its operations in recent years to provide accountancy and advisory services to business owners throughout the south of England including Surrey, Sussex, Hampshire, Kent, London and the Isle of Wight. Against a professional landscape that is increasingly digitised and automated, James Todd & Co aims to provide professional, yet approachable, personalised services tailored to the needs of small and medium businesses.

Challenges

In the digital age and particularly as accountancy firms grow, the IT platform has become more crucial to support the business, enabling the firm to offer a wider range of services to clients. James Todd & Co was struggling with reliable access to software and data across its three offices and needed to introduce a more consistent IT structure across all sites. As well as standardising software applications, the firm needed more flexibility to enable fee earners to move around the different offices, work at home or at client sites, all supported by improved security and data backup.

It was also important for the firm to strengthen the existing internal IT policies and procedures. James Todd & Co turned to Orca, initially to support their ageing IT system, but it soon became clear that a 'band-aid' approach was not sufficient for a growing accountancy firm

Our Solution

Orca conducted a comprehensive needs assessment and recommended that adoption of a private cloud solution was most suitable for James Todd's requirements, supported by enhanced security and improved communications. The flexibility, security and cost-effectiveness of hosted desktop delivers the robust, reliable, secure IT platform that a modern accountancy firm needs to support its business and its clients.

The initial phase of the project was the installation and configuration of an outsourced hosted desktop system. Email services were migrated to Microsoft 365 and mail-archiving and compliance systems were implemented to capture all communications. Secure email was implemented to encrypt email communications allowing users to protect highly sensitive email content.

Orca worked closely with the internal management team to plan and scope the entire project from initial concept through to the final migration. All migration tasks were completed over a weekend, reducing downtime to almost zero.

The firm now has a standardised set of applications and productivity tools, such as IRIS, Sage and Microsoft Office running consistent versions on the hosted platform. The James Todd team, no matter where they are working, all log onto their usual desktop system, making remote working easy and intuitive. All data is centralised, controlled (essential for GDPR) and accessible by all the team, regardless of location. The solution has also simplified several back-end procedures including backups and disaster recovery planning. For additional security and in line with best practice, the firm has also adopted multi-factor authentication.

Orca has really supported our firm and helped us to move to an IT platform that will enable us to grow and expand the business. They understand the IT needs of accountancy firms and the software we use and have broad experience working with a growing accountancy practice. The move to the hosted desktop solution has been very good and due to the planning and expertise by all involved, we are really appreciating the benefits. This has been a really well-run project and I wouldn't hesitate to recommend the Orca team.

Julie Saunders
James Todd & Co
Practice Manager

Technology you can count on

www.orca.co.uk
0345 504 8989

