



# Practice Management

innovative • functionally rich • technically advanced

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Stephen Slater, RMT Partner, RMT



real people account for more  
ACCOUNTANTS + BUSINESS ADVISORS

An in-depth Case Study



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Even though the image of chartered accountancy has come a long way since it was lampooned as a profession by the Monty Python team in the 1970s, many people still have little appreciation of the scope of services and business advice that today's firms provide.

But RMT has set out to change this – not just from the services perspective but also by breaking free from the 'zero personality' stereotype of accountants and carrying out an extensive re-branding exercise. Dull is out for the Newcastle-upon-Tyne based firm, from its striking new website, to its corporate colours, to its strapline 'real people account for more'.

Marketing is taken very seriously at the firm and it is an attitude that is paying off, judging from RMT's expanding client base and the growth in the size of the practice. With six partners and 75 staff in the accountancy practice, together with 25 people in its financial services division and satellite offices,

RMT is one of the leading independent firms of accountants and business advisors in the North East.

RMT Partner, Stephen Slater, explained that the practice was set up in 1954 – when any form of advertising by chartered accountants was absolutely forbidden by the professional bodies – and has been serving a broad range of clients ever since. "We have the typical mix, from sole traders through small to medium sized enterprises, to companies turning over more than £100 million. The firm also has one of the largest insolvency teams in the region and we are strong in corporate rescue and recovery," he says.

In addition, RMT has developed a niche within the medical and legal professions, acting for over 130 medical practices and GPs around the UK, as well as a good number of barristers in the North East.

Client service really matters at RMT – several family businesses have been with the firm for more than 50 years –

and everyone at RMT works together to develop and maintain the best possible client relationships.

For owner managed businesses, for example, and for which Stephen has particular responsibility, the emphasis is giving clients everything they need to support them at every stage of development and help to get them where they want to be.

Each client has a dedicated team of people, to which access and availability is a high priority, bringing together a mix of commercial knowledge, accountancy, tax expertise and other specialisms that can help clients to operate more efficiently, increase profits, minimise taxes and maximise wealth.

This teamwork approach is also applied internally and has a track record of delivering results, as evidenced most recently by the firm's marketing programme and before that, when RMT decided to review its practice management software back in 2001.

**STAR**

The Professionals' Choice

“At the time, we were using Solution 6 software which was merged with Viztopia and we thought it would be a good idea to look at the alternatives to a straight upgrade. We set up a small team, and devised a scoring system to evaluate five possible suppliers. The team evaluated three of these five in detail, before shortlisting Viztopia and Star Computers. After a demonstration, the team recommended the Star Practice Management software,” Stephen says.

The team felt that the Star solution fitted the way that RMT was working currently and would also be able to meet the demands of the practice as it grew. The operational flexibility of Star’s systems was illustrated by the variety of firms that were using the software, ranging from sole practitioners through those of a size similar to RMT, to the big regional and Top 4 firms. Another big plus during evaluation was Star’s client care module.

A major benefit of the Star system is its flexible modular approach, which allowed RMT to select specific modules to meet its precise needs. The core system provides a powerful state-of-the-art time and billing solution while a range of other modules, covering such functions as job and resource management, business intelligence, contact relationship management and document management can be added as they are needed.

Having made the decision to move, RMT was keen to go live as soon as possible. The firm transferred its time ledger and associated data into Excel over a two-week period and sent the file to Star on a Friday where it was imported to the central database over the weekend.

“We were up and running with time sheets on the Monday,” Stephen recalls. “It all went very smoothly – so much so, that people didn’t really notice the change – and we then turned our attention to getting the rest of the software onboard. The ease of use, responsiveness of the system and flexibility of reporting all came up to expectations, as did the standard of Star’s implementation support.” From a management perspective, RMT particularly likes the online billing function through which managers produce their own fees invoices. They also value the work in progress reports, breaking down the client work for which they are responsible.

Just as RMT sets great store by the quality of its client relationships, so does Star. Stephen comments that in terms of design, implementation, development of the reporting functionality and general support, Star’s consistency of involvement has been excellent.

“Moving to the SQL server version, for example, was a significant step, with Star playing an important role in



ensuring success of the project. We are committed to the Star system as the prime central database for the practice. The CRM module will be great for helping to manage client relationships and associated contacts, exploiting opportunities for generating additional revenues and in running effective marketing initiatives,” Stephen says.

The existing Star database is extended using Contact and Profile Information to hold information about clients, their contacts and the work that RMT currently undertakes. User definable profiling can then be exploited to identify target audiences for marketing campaigns, followed by generation of mailings.

Once a campaign has been initiated, the Event Management feature tracks progress, captures feedback and manages associated marketing events, such as a conference, seminar, lunch and so on. As a consequence, the successful creation of new business opportunities feeds the firm’s sales pipeline and helps to manage the creation of new business opportunities.

Relationship Management enables notes and activities to be created against clients, contacts and jobs. Notes can have a follow up activity associated with them and can be allocated to any member of staff while an activity, together with due date that is automatically flagged to the appropriate individual, can also be set to appear in their Outlook Tasks.

Further ahead, RMT has a copy of Star’s new Dashboard software, a web-based business intelligence system that enables authorised users to identify information about their contacts and clients, and the work they are doing for them. Star Dashboard retrieves and combines a broad range of client data, details of WIP, fees and so on, into a single web view – whether within the Star Practice Management system or third party applications. To complete the picture, the Star Dashboard also generates letters and emails, as well as locating and retrieving all client-related documents.

At practice level, authorised partners and managers can easily access key financial data covering WIP and fees, broken down by portfolio, department and office enabling effective management of the practice and monitoring of resources. Clients, contacts, fee analysis, client exposure, efficiency and profitability – and much more – can all be displayed instantly.

[www.starpracticemanagement.com](http://www.starpracticemanagement.com)

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