

Dext

Case Study

**Peter Jarman
& Co. Melling**

How Peter Jarman & Co.

use cloud technology to stand out
as specialist advisors to the small
business community



Our staff have more than doubled in 18 months thanks to Dext."



Peter Jarman & Co



About The Firm

Peter Jarman & Co (PJCO) is an accounting firm based in Shoreham-by-Sea in West Sussex. Founded by Peter in 1989, PJCO was Intuit's UK Firm of the Future in 2018 and a finalist for the 2020 Accounting Excellence awards for Client Service and Investing in People.

As one of the top-rated firms on QuickBooks Online 'Find an Accountant' Service, they are continuously growing their team and client base across the UK. And they put this extraordinary growth down to their use of cloud accounting.

Here's how PJCO have implemented technology in recent years to accelerate growth and increase their staff to client ratio by 15-20%.



Moving Beyond Manual Bookkeeping

PJCO first started using Dext in 2016 after learning more about it at QuickBooks Connect and Accountancy World. Before Dext, SME Business & Tax Manager and Chartered Certified Accountant, Kayvan Khoroosi, described their bookkeeping processes as messy and old-school.

"Receipts were not being put on the system, and a lot of our clients would do their bookkeeping themselves. Now, they don't have to keep hold of their receipts, and have peace of mind. Once they take a photo of a receipt, they don't have to think about it again. They've really embraced the change," says Kayvan.

However, there was a real turning point when they started to see how Dext could add value to their service. "One of our clients runs a hotel, and used to store their information in big paper folders. Each quarter, they would give them to their prior accountant to sort through. Inevitably, there would be things missing. They were probably missing out on a lot of tax they could have been claiming, particularly as they used both personal and company cards for purchases, says Rowan van Tromp, Cloud Services Manager.

"Our staff have more than doubled in 18 months thanks to Dext." Rowan van Tromp, Cloud Services Manager

"As soon as we introduced Dext, their life changed literally overnight. With the mobile app, it was so much easier to keep on top of things. They could capture things instantly and not have to worry that expenses were being missed. In short, it saved both of us time and reduced their tax!"

Since PJCO rolled out Dext across their entire client-base, they are now growing between 20-30% year-on-year. "Sixty per cent of this growth is due to our software. If we didn't have it, we would not be able to grow as quickly. Our staff have more than doubled in 18 months thanks to Dext," says Rowan.



Dext made life a lot easier to go out and get more clients. We no longer need to type anything out ourselves. It's accurate because it's being read by technology, plus it's stored in the cloud so you don't have to worry about where it is."



Increasing the client to staff ratio by 20%

With the time-saving efficiencies of QuickBooks Online and Dext, PJCO have been able to take on more clients from all over the world, as well as reducing the time spent to service each one.

"With technology like Dext and QuickBooks Online, we are now able to serve 15-20% more clients. We host webinar meetings with clients all over the world. Plus, the data entry work we used to do in Excel used to take a few hours per week per client. Now, that's all done automatically," says Kayvan.

"Dext made life a lot easier to go out and get more clients. We no longer need to type anything out ourselves. It's accurate because it's being read by technology, plus it's stored in the cloud so you don't have to worry about where it is."



Finding Talent Through Technology

It's clear that PJCO pride themselves on their talent. Unlike many firms who struggle to find new talent, large numbers of applicants are attracted to PJCO due to their use of cloud technology. "We don't struggle to recruit. We always have applicants because we're using technology so well. It's a game-changer, and they want to be ahead of the game."



Making a Difference For Clients Who Need It

Rowan is also the Finance Director of Norwich Food Hub, a not for profit run by volunteers to tackle the environmental cost of food waste and hunger in Norwich. Rowan uses Dext to systemise key processes to enhance efficiency day-in, day-out.

"If we go back to where it started, we were filling out paper forms to get the weight of food and understand what had been collected. That was just not scalable. That's why we moved to online systems," says Rowan.

"Now, we at PJCO are remotely involved and use Slack to communicate regularly. We use QuickBooks Online and Dext in the background, so that volunteers can submit receipts and get expensed quicker if needed. It makes submitting and chasing that much easier."



We also recognise that not all clients need budget forecasting. That's why we've developed a modular tech stack for each industry, focused on their specific needs. For instance, for non-profits like Norwich Food Hub, we use dedicated project management apps."



A Tech Stack for Every Client

With around 600 clients, PJCO work with anyone who wants to use cloud technology and grow their business.

"We are not looking for clients who bring in a bag of receipts once a year. Instead, those who want monthly reports and budget forecasts for the year ahead," says Rowan.

"We also recognise that not all clients need budget forecasting. That's why we've developed a modular tech stack for each industry, focused on their specific needs. For instance, for non-profits like Norwich Food Hub, we use dedicated project management apps."

This modular tech stack means they can roll out processes that are at once personalised and standardised.



Becoming the best online accountancy in the UK

Setting high targets has been key to the long term success of PJCO. For example, their aim was to become Intuit's Global Firm of the Future. In 2018, they became Intuit's Firm of the Future for the UK.

"When we were announced as winners, the feeling was unbelievable - especially as we beat a lot of very talented competition. To be number 1 in the UK in a special achievement. As a result, the whole office environment has changed. We are now getting new enquiries daily as a result. Thanks to a sharp increase in work, we've also recruited 2 graduates onto our ACCA Graduates training programme."

"Representing the UK at QuickBooks Connect San Jose was fantastic. We met so many professionals from all over the world and made some great contacts as well. It was the best place to be to see the innovations from Intuit and many of the other providers like Dext."

Now, the team at PJCO are looking to continue their extraordinary growth, open two satellite offices around their headquarters, and become the best online accountancy in the country, offering their clients the best possible service.

Ready to grow your practice?

Dext can help your practice become more productive. Speak with one of our product experts today

dext.com/consultation