



Accountancy Case Study

A new IT Strategy to support a growing accountancy practice



The client

Abbott Moore LLP is a fast-growing tax and accounting practice in Bedfordshire providing a wide range of services to small to medium sized businesses and freelance contractors. The practice is PCG-accredited.

The issue

In 2012 the company recognised the need to invest in a new company-wide IT system to support its growth. As a highly regulated profession, it was essential that any new system would have to comply with the ICAEW's Practice Assurance standards. Information security, backup procedures, business continuity and disaster recovery were key requirements.

Octree's approach

Abbott Moore was reliant on a wide range of software, including Microsoft Office, as well as specialist applications for accountants and tax practitioners from CCH, and commercial PC-based accounting systems such as Quickbooks, Sage and Moneysoft Payroll. All employees routinely used the Internet and email was the primary method of communication with clients.

With in-depth knowledge of the professional services sector, Octree understands the ICAEW's Practice Assurance standards and knows exactly what is required to ensure that the systems and information security procedures and tools we recommend are fully compliant. We have established a robust methodology that enables us to create an effective yet flexibly IT strategy, and for Abbott Moore we introduced:

- A dedicated server that handles key applications and office-wide printing.
- A secure data back-up solution with off-site storage for added security.
- A cloud-based email system, providing security and remote access via a range of devices.
- A VoIP (Voice over Internet Protocol) hosted PBX that handles telephone calls in a cost-effective manner.
- Ongoing monitoring of and proactive support for the IT systems.

A range of security measures were also implemented:

- Disk encryption on the firm's laptops to protect against unauthorised access to data in the event that one or more is lost or stolen.
- Web filtering to control access to inappropriate websites and protecting against web-based malware.
- Email filtering to protect PCs against phishing emails, spam, email-borne viruses and malware.
- A managed firewall and VPN offers secure remote access for remote users.

James Abbott of Abbott Moore says: "Protection from viruses, malware and malicious attacks had been an ongoing worry for us, not to mention the fines that could be imposed by the Information Commissioners Office in the event of losing sensitive client data. We've worked hard to get a good reputation and didn't want to risk that through failures in IT. The systems and measures Octree introduced have ensured that Abbott Moore is fully compliant with the ICAEW's Practice Assurance standards."