



## Client Feedback

**“Outsourcing has had a significant positive impact on our ability to focus on core activities and support the growth of our practice.”**

— *Anonymous*



### Background & Context

***Please provide an overview of your practice (e.g., size, industry focus, client base)?***

Our practice is comprised of approximately 20 team members bringing together a diverse range of expertise in Accounting and Tax Services for all types of businesses and individuals.

***What were the primary reasons for outsourcing your accountancy functions?***

One of the primary reasons we chose to outsource our accountancy functions was to support staff retention. By outsourcing these responsibilities, we were able to reduce the workload and pressure on our internal team, allowing them to focus on their core roles and areas of expertise. This not only helped improve overall job satisfaction but also contributed to a more balanced and sustainable working environment.

***How long have you been using outsourced accountancy services?***

We have been using outsourced accountancy services for approximately seven years. Over this time, outsourcing has become an integral part of how we manage our financial operations. The consistency, reliability, and specialist expertise we've gained through this approach have allowed us to streamline processes and maintain a high standard of compliance and reporting.





## Implementation & Transition

### ***Were there any challenges during the implementation phase? How were they resolved?***

During the implementation phase, the main challenge we encountered was adapting to a new way of working. Shifting from internal processes to an outsourced model naturally required a period of adjustment, particularly in terms of communication flow and day-to-day operations. However, with clear organisation, thorough planning, and defined procedures, the transition was managed smoothly and efficiently.

In the early stages, the responsibility for liaising rested solely with me in my role as manager. This helped ensure consistency and clarity during the initial setup. As the relationship developed and the process became more embedded, communication broadened across the team, allowing for a more collaborative and streamlined approach.



## Outcomes & Benefits



### ***What measurable benefits have you experienced since outsourcing (e.g., cost savings, improved efficiency, better compliance)?***

Since outsourcing our accountancy functions, we've experienced several measurable benefits, most notably in terms of cost savings and improved operational efficiency. One of the most significant areas of cost reduction has been in recruitment.

By outsourcing, we've avoided the ongoing expenses associated with hiring, training, and retaining in-house finance staff. Internal resources have also been freed up to focus on core business activities leading to a noticeable improvement in efficiency.



### ***How has outsourcing impacted your practice's ability to focus on core activities or grow your business?***

Outsourcing has had a significant positive impact on our ability to focus on core activities and support the growth of our practice. As a manager, I've been able to redirect my time and attention toward higher-value work, such as project management and software development.

Previously, a considerable portion of my time was taken up with routine or junior-level tasks, which limited capacity for long-term planning and development. By offloading those responsibilities, we've created space for leadership to concentrate on growth initiatives and driving the business forward more effectively.



## Client Experience



### ***How would you describe the quality of service provided by the Affinity team?***

The quality of service provided by the Affinity team has been consistently excellent. They are punctual, professional, and highly reliable in every interaction.

### ***How responsive and accessible has the provider been in addressing your needs or concerns?***

The provider has been extremely responsive and accessible in addressing our needs and any concerns that arise. Whether it's a routine query or an urgent issue, their team is quick to respond and always available to provide guidance or support.



## Technology & Tools



### ***What accounting software or tools do Affinity need to use to fulfil your needs (Xero, QB, Dext etc)?***

To meet the needs of our practice, the Affinity team works with a range of accounting software and tools, including Xero, CCH, Sage, QuickBooks Online (QBO), FreeAgent, and Dext.

Their ability to work seamlessly across multiple platforms has been a key strength, ensuring they can adapt to our systems and workflows without disruption.

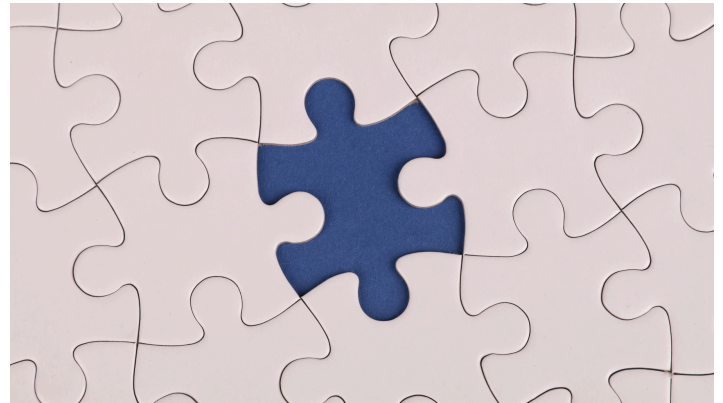


## Challenges & Areas for Improvement

### ***How have Affinity handled any issues or mistakes that arose?***

Whenever any issues or mistakes have arisen, the Affinity team has handled them with the utmost professionalism and efficiency.

Their transparent communication and proactive approach in managing challenges have reinforced our confidence in their services, demonstrating a strong commitment to quality and client satisfaction.



## Future Plans



### ***Do you plan to continue outsourcing your accountancy functions in the future? Why or why not?***

Yes, we plan to continue outsourcing our accountancy functions in the future. Over time, the Affinity team has become an integral part of our workflow, seamlessly integrating with our internal processes and contributing to the smooth running of our financial operations.

We see outsourcing not just as a service, but as a valuable extension of our team.

### ***Are there additional services or support you would like to outsource in the future?***

Looking ahead, we are considering the potential to outsource additional services, particularly income tax. Expanding our outsourcing to include income tax support could help us further streamline our operations and ensure specialist expertise is applied to this important area.



***On a scale of 1 to 5, how satisfied are you with Affinity, why?***

***Would you recommend us to other practices? Why or why not?***

We rate our satisfaction with Affinity at 4.5. Their team is highly responsive, delivers accurate and timely services, and integrates well with our internal processes. The slight gap from a perfect score

I would highly recommend Affinity to other practices based on their service, professionalism, and expertise. Their support has been invaluable in streamlining our accounting functions and allowing us to focus on growing our business.

leaves room for continuous improvement, which we view positively, as it encourages ongoing growth and refinement in the partnership. Overall, we are very pleased with the value and support Affinity provides.



***Is there anything else you'd like to share about your experience with outsourced accountancy?***

From a managerial standpoint, one limitation is the inability to visit the Affinity team and see their work environment first-hand. While Affinity has graciously offered the opportunity to visit, the travel expenses involved are generally the responsibility of our practice, which makes it challenging to take up this offer at present.

Nonetheless, this hasn't impacted the quality of our collaboration. Through effective communication and a strong working relationship, Affinity continues to deliver excellent service and support. We look forward to the possibility of an in-person visit when circumstances allow.