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Automation delivers operational excellence for Moore Global.

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Spotlight on Moore Stephens Channel Islands

Moore Global is a worldwide professional services firm, specialising in accountancy, tax and financial management. Their purpose is to help people thrive – clients, people and the communities they live and work in. They are a global accounting and advisory family of over 30,000 people across more than 260 independent firms and 110 countries, connecting and collaborating to take care of your needs – local, national and international.

Moore Stephens Channel Islands is part of Moore Global.

over
110
countries

over
260
firms

over
600
offices

over
30k
people

Key Benefits

Implementing 5Series has resulted in the following key benefits to Moore Stephens:

7

updates per year, delivered either live or via FTP download

100+

new features delivered over the product lifespan

24/7

support and assistance available from Quantios

After evaluating and shortlisting a number of options, Moore Stephens Channel Islands chose Quantios 5Series.

Evaluation and Adoption

A replacement platform was needed because the incumbent software was outdated and the firm wanted a system that supported future development. As Paul Fromage, Head of IT commented: "Our legacy product just wasn't compatible with future business strategy and 5Series offered a much better fit." Paul Fromage, Head of IT, Moore Stephens.

Improving Operations

Moore Stephens required a software solution with strong controls around data management and in particular, data entry and amendments. The firm also wanted the ability to assign tasks and workflows for specific users, whilst retaining flexibility around how those data elements could be edited or stored within the system. The software also offers query and dashboard features that give users the ability to generate management information, but not have this restricted to people in technical roles – another key requirement.

"We know exactly when enhancements are coming and their greater frequency means less testing on our side each time, because every release includes fewer yet more relevant changes"

Paul Fromage

Head of IT, Moore Stephens

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"The Quantios frequent product release model benefits us greatly. Updates are made at pre-agreed intervals and in a structured way."

Paul Fromage

Head of IT, Moore Stephens

> "In the rare instances where we have had a problem, Quantios have been very responsive, immediately removed the release from the FTP site and provided a fix within a matter of days."

Paul Fromage

Head of IT, Moore Stephens

Product enhancements released every 6 weeks

Keen to keep pace with new software releases issued by Quantios, Moore Stephens have implemented a product enhancement on average every 6 weeks, according to a set development schedule. "Quantios has been very agile about providing enhancements and feature changes and we've actively engaged with them to adopt what is most important to us," said Paul Fromage. "We track scheduled releases closely and whenever a new one is announced, we review internally whether or not to upgrade and begin the internal process. One key enhancement that springs to mind was the improvement to time and billing reporting procedures, which has really been a benefit."

The internal process Moore Stephens adopts to implement a new release is based on a 10 working day user acceptance cycle, whereby the new software is applied to a test environment and assuming that no issues are found, the release is set live to users within 4 weeks. Working in this way ensures there is almost no disruption to business as usual.

Ensuring Alignment

Before each issue, Quantios hosts a client webinar to introduce the new features available and also circulates comprehensive release notes, providing information on everything that is new, any bug fixes and key changes likely to have an impact.

"We use this information in conjunction with our own user acceptance testing process and it helps us to adapt our internal processes where required by the new functionality," adds Paul Fromage.In addition to implementing new versions, Moore Stephens has completed some substantial enhancements to customised client workflows. Moving forwards, Moore Stephens are expecting to introduce enhancements around the national risk register and risk assessments, plus changes to beneficial ownership reporting – all key compliance improvements.

"Working closely with our partners allows us to deliver tangible benefits quickly, reliably and with minimal friction. By integrating their feedback we can iterate quicker with greater impact."

Simon Witkiss

Global Head of Product & Marketing, Quantios

Help and Support

"Overall, we have been very proactive about putting forward our ideas for new features to Quantios and this is evident in the hundreds of closed support calls raised in Jira", says Paul Fromage. The sheer number completed demonstrates how widely Moore Stephens has deployed the new software releases and the high level of responsiveness provided by Quantios. "The support team at Quantios are extremely helpful and if we compare their approach with hat we got previously, the service we receive now is superior to our previous solution," adds Paul Fromage.

A predictable cadence to updates, helpful support and responsive to feedback.

A close working partnership

Quantios regularly hold a Product Advisory Group, which provides a formal mechanism for informing users about what is in the pipeline and exchanging ideas and plans for future development. The group also provides a forum for customer feedback on changes to regulatory compliance requirements.

"Quantios as an organisation are very industry aware and proactively build new functionality to support ongoing changes to regulatory compliance requirements, such as FATCA and CRS reporting", says Paul Fromage.

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Want to know
how 5Series
could help you?

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