Building a small, agile online business thanks to Microsoft cloud

Ledgerscope is a small software development company servicing the needs of accountants. Like many new businesses, ready to launch its first products to market, it needed technology that fitted a small business budget whilst being reliable and scalable. Faced with solutions that were overly expensive or too complicated, Ledgerscope turned to Microsoft. Geared up to meet the needs of small businesses, the Microsoft cloud provided the perfect solution. Ledgerscope now hosts its client services on the Microsoft Azure platform and runs the business using Office 365, Windows 10, Dynamics CRM Online and Yammer. With an exciting future in sight, the connected team are fully equipped to do great things every day, while the business has tools that will always stay current, thanks to Microsoft.

Back in 2010, Adrian Pearson, a practicing accountant spotted a gap in the market. In an industry swamped with tools to record year-end numbers, there was nothing available to automate the process of reviewing those numbers and making the necessary adjustments and corrections before finalising the year end accounts. He wanted to create software and services to do just that, freeing up accountants from repetitive work and in turn making their practices more profitable.

Ledgerscope was born. The business today has two sophisticated cloud-based products - Checkmybooks™ and Movemybooks™ - which offer accountants unique new ways to automate the handling and review of clients' year-end accounts data and migrate data to online accounting solutions, helping them deliver better client service with much less effort. For Matthew Steeples, CTO of Ledgerscope, ongoing development of the internal and external IT environment is vitally important as the business looks to launch new products and continue to grow the market.

Challenge – Creating a platform for growth

Like many small businesses, Ledgerscope has limited resources but wants to get the most out of every day; so the company needs technology to work hard. The small team of 10 all work remotely so keeping co-ordinated with unrestricted communication is vital to staying productive.

At first, Ledgerscope used Google Apps for email and document creation, together with Skype for team communication. Customer support was managed through an external ticketing system and one person's email inbox. Matthew feared that the business would fast outgrow the software, and he was right. After just 12 months, Ledgerscope needed greater capability and the ability to efficiently expand to the next level. Poised to launch its first online product, Ledgerscope faced excessive infrastructure investment with a specialist hosting company, so Matthew decided it was time to look further afield.

"I soon realised we needed tools which were much more business-capable," says Matthew. *"If we wanted to locate historic customer correspondence, we struggled, and we couldn't make the most of our data for product development and marketing. All things that are vitally important for a small business."*

## Solution – Secure, accessible cloud technologies

Determined to find a better approach, Matthew turned to Microsoft. Ledgerscope now subscribes to Office 365 for cost-effective business-grade email and Microsoft Office products, coupled with Skype for Business for instant messaging and conferencing, and cloud document storage in OneDrive for Business. SharePoint, also included in Office 365, houses Ledgerscope's fully automated order system and a central place for document collaboration and team working. Dynamics CRM Online, integrating with Ledgerscope's customer solutions, centralises all customer information and helps Ledgerscope deliver seamless customer service and targeted marketing. All laptops and tablets have been upgraded to Windows 10 and Yammer has enriched social interaction, giving the team a place to chat, share information and view informal business updates.

"We now have capabilities which we thought were only available to larger businesses! That means we can keep developing our services and growing without losing the personal service and company culture that makes Ledgerscope unique. Supported by these tremendous cloud services, we're very excited about the future."

Matthew Steeples
CTO
Ledgerscope

For more information, visit:
www.ledgerscope.com

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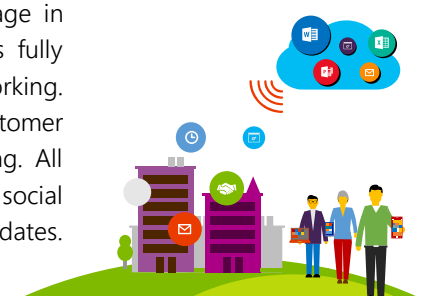
Microsoft Lumia Smartphones complete the modern technology toolset, enabling the team to work from anywhere, with all of the necessary documents and applications at their fingertips.

Hosting of Ledgerscope's products and services has also moved to the Microsoft cloud for a more secure and reliable solution. The cost-effective scalability of Microsoft Azure - Microsoft's cloud computing platform - provides the business with an ideal platform to deliver its solutions using multiple cloud-based virtual machines, highly secure data storage capabilities and service bus messaging to ensure its customers receive the highest levels of service delivery. Plus, Ledgerscope has complete reassurance that Azure can scale up and down in minutes – the Azure 'pay as you go' subscription model means that Ledgerscope can always meet the fluctuating requirements of its customer's base, and only pay for the actual services it actually uses.

Matthew comments *"We're still a small team but we work in a very connected way and do things that are quite sophisticated for a business of our size. Azure has been remarkable for delivering our products; we had virtually no up-front costs but when we hit a busy patch we can increase the number of virtual machines to meet demand very quickly and always give our customers uninterrupted service."*

Benefits & Value

Greater day-to-day efficiency

- Integration between Dynamics CRM Online and Ledgerscope's online customer solutions streamlines customer account creation - when a new customer order comes in, a CRM record is automatically created logging contact information and transaction values
- Automation workflow within SharePoint Lists has enabled Ledgerscope to create a new order management system, significantly reducing manual tasks
- Ledgerscope has been able to equip the business with the latest applications and capabilities without any upfront cost, knowing it will automatically receive software updates within its predictable monthly subscription cost
- With all IT safe and secure in the cloud, supported by uptime guarantees, Ledgerscope never has to worry about on-premise systems going down or unexpected expensive repair costs

Customer service excellence

- Microsoft Dynamics CRM Online has consolidated contact details, correspondence and purchase information into one easy-to-use central location, so the team can find any information they require instantly to deliver great customer service
- Multiple desktops in Windows 10 help the busy internal team to efficiently manage multiple customer enquiries at once by creating different desktop environments to separate documents relating to each case
- With Skype for Business instant messaging, screen sharing and audio conferencing, customer enquiries can be handled professionally and efficiently by the right people for the job
- Microsoft Dynamics CRM supports Ledgerscope to nurture customer prospects with joined-up marketing activity from lead capture at tradeshows, through to ongoing service marketing

Productive team working

- OneDrive for Business gives internal and external team members a facility for secure, online document storage coupled with the ability to collaborate on a wide range of content including meeting notes, solution sample files, design documents and more
- Mail and Calendar applications in Windows 10 help everyone keep up-to-date with appointment and new message notifications delivered direct to their desktop without having to open the Outlook application
- Document collaboration features in Office 2016 have transformed team working, enabling multiple people to edit content, share comments and connect in Skype for Business, right from within the application window

"We've made the work day more efficient because we can get more done. We've developed better business practices all round which let us focus on spending time with customers. The technology gives us the functionality to do that."

"Skype for Business helps us give our customers a great service experience. We can chat with them over audio or video conference whilst getting answers from others in the team via instant message or screen share. We can even bring another person into the call in a single click."

- Yammer has created a connected, social business where the team can share information through digital noticeboards in an informal way and the management team can provide fast business updates
- The 'Tell Me' feature in Microsoft Office 2016 helps everyone get work done faster by helping them to quickly finding the functions they need and discover new ways to create professional looking documents

Business without boundaries

- Office 365 applications provide Ledgerscope with efficient online and offline working capability so the team can be productive even wherever they are working, safe in the knowledge that work will automatically save into the cloud as soon as they are online again
- Cloud-based admin portals for both Office 365 and Azure ensure that all systems management tasks, like changing group policies, can be completed fast from any location, to keep the business running efficiently at all times
- Windows 10 digital assistant, Cortana, integrates seamlessly across laptops and Lumia Smartphones helping the team to stay on top of their day with handy reminders, calendar updates and fast search capability across files, apps and the internet

Security reassured

- Dealing with accountancy data requires the highest levels of confidentiality, but by hosting its customer solutions on ISO-certified Microsoft Azure, Ledgerscope can guarantee the highest levels of information security and service availability
- With Microsoft Azure and Windows 10, Ledgerscope has been able to safeguard information and devices by introducing multi-factor authentication for core systems, as well as PIN and picture password features in Windows 10 to secure devices. The devices make use of Bitlocker encryption so that even if they're lost or stolen the data is still safe and secure.
- Automatic data security and back-up in Office 365 and Microsoft Azure gives Ledgerscope real peace of mind that its information will always be accessible and retrievable in the event of a disaster without the need to invest in expensive third-party products

Scalability for growth

- When Ledgerscope faces peaks in seasonality demand, Microsoft Azure scales out automatically to accommodate additional customer site usage with optimum performance
- Growing the customer base poses no challenge for Legerscope either - it can manually expand its Azure environment to add new virtual machines cost-effectively, within minutes
- As the team grows, or external partners require temporary systems access, Ledgerscope can speedily add new Office 365 licenses, or remove them, at any time from the online management console
- Using industry-leading Office 365 applications to work effectively and stay connected from anywhere in the world, Ledgerscope can maintain a virtual business without office overheads and continue to attract the best talent

Matthew's Favourite Features

"The 'Tell me' feature in Office 2016 is very impressive! When I need to do something new, I just type some keywords into the box in the app header and the command link I need appears..."

"...Azure Service Bus Messaging saves us so much time and money. It reduces the cost of integrating our systems, lets us deliver an efficient service so we only pay for what we need, and helps us give the customers a fast, joined up experience from the moment they sign-up online...".

"...In Outlook, we can now choose how much data we store in the desktop app. This is incredibly useful as our system log inbox receives 10,000 messages a day! If a month's load of data synchs locally, it's incredibly hard to manage."

"Accountants have specific seasonality but with Microsoft Azure we can accommodate those spikes in demand by scaling up when required and scaling back down to reduce costs when the service isn't in use.

"With 1TB of secure data storage in OneDrive for Business, we have been able to move our large design and sample files into the cloud, freeing up internal disk space and still providing the team with a central place to work on the information together.

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