



# Case Study

## CLIENT



Blu Sky is an innovative and fast-growing accounting practice based in the North East, with clients all over the UK. They support all types of business, and have a particular expertise in early stage and growth businesses.





Like many accounting practices, Blu Sky has an established company secretarial practice. It was run manually - registers were created and maintained in Word or Excel, Companies House filings were done via webfiling and ancillary documents (e.g. share certificates, EIS certificates, etc) were created ad hoc.



### Challenges faced:

This more 'traditional' method of running a cosec practice was not sustainable, especially as the business wanted to grow and make the practice more efficient and profitable. In addition, recent team changes meant that cosec tasks needed to be shared between the team, with differing levels of experience and the existing manual processes could create risk as well as take undue amounts of time.



### Client Objectives:

Blu Sky was looking for a competitively priced software system that saved time and cost, reduced risk, allowed multiple team members and clients to access information and supported the expansion of their cosec practice.



### Solution:

Blu Sky chose Kudocs because they really liked its functionality, ease of use and pricing model. Reagan Henderson, who leads the cosec team, says that they "use it for literally everything. Whether it's just updating a director's address, or doing all the paperwork, filings and register updates for a share issue, it saves so much time and effort." Using Kudocs has enabled the firm to revise its cosec pricing structure - moving from ad hoc charges to a monthly retainer, which has been universally well-received by clients.

Using Kudocs has enabled the firm to revise its cosec pricing structure - moving from ad hoc charges to a monthly retainer, which has been universally well-received by clients. As well as serving existing customers, Kudocs allowed the firm to onboard all new customers onto a cosec package seamlessly, whereas before they would have needed to check capacity in their existing processes.

"We used to dread taking on a client with 100+ shareholders just because of the extra time and admin that would bring - even just preparing and filing a confirmation statement. Now, using Kudocs, company size does not matter - it all takes seconds."



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Kudocs' pricing model allows Blu Sky to put clients on the most appropriate package: Blu Sky can tailor their costs & fees to the client's needs. From those with basic cosec needs on the Essential package, to those with complex option schemes on Advanced - the Kudocs functionality and costs dovetail with the Client's requirements.

"We particularly love the incorporation tool and incorporation questionnaire, the ease of preparing confirmation statements and the mismatch tool so we can spot when a client files without telling us. We use it everyday and can do everything our clients need. We are much more confident of our ability to deliver fast, cost-effective and precise services as Kudocs takes so much of the strain."



#### Benefits:

**Operational Efficiency:** Blu Sky can share cosec tasks between a wide team thanks to the unlimited number of users. Kudocs is easy to use with helpful materials on their website and hyper-responsive customer service. This means that any team member can always be sure of what they need to do and how. There is no risk using Kudocs.

**Time savings and cost efficiency:** Kudocs has slashed the amount of time the team spends completing cosec tasks. This has enabled them to switch to a monthly retainer model which offers clients greater clarity on price and ensures team efficiency.

"Using Kudocs saves us time and frees us up to do other work."

**Growth and Scalability:** Kudocs' pricing model (pay per entity) allows Blu Sky to grow its cosec practice without risk. It only pays when it has a corresponding client. As Blu Sky has grown, so has Kudocs without Blu Sky having to take any cost risk - either from Kudocs or from team expansion.

#### Conclusion:

The implementation of Kudocs has been instrumental to Blu Sky in upgrading its cosec offering to clients and expanding the business line. Kudocs' ease of use and speed saves the team huge amounts of time and reduces risk significantly. Blu Sky has used Kudocs to provide even better levels of service to existing clients and grow their client base, revenue and profits, and plans to continue this expansion with Kudocs' support.