



# Case Study

## CLIENT



Enabling scalable company secretarial services through automation

CB Reid is a chartered accountancy practice that works with a diverse range of clients – from high-growth startups to established SMEs – offering expert advice across tax, accounting, and corporate compliance.





Previously operating as an independent firm, CB Reid was acquired by a top 20 national practice in 2023. The team continues to provide specialist support to a growing number of clients, particularly within the startup sector, where responsiveness and compliance are critical. With an increasing demand for company secretarial services, CB Reid recognised the need to streamline its operations while maintaining service quality across a varied and expanding client base.



### Challenges faced:

CB Reid had historically provided company secretarial services as an ancillary offering—handled manually, priced modestly, and often delivered with limited internal confidence. Processes such as issuing EIS certificates, managing confirmation statements, and facilitating investment rounds were time-consuming and lacked standardisation.

As the firm scaled and took on more startup clients with complex needs, these manual processes became unsustainable.



### Objectives:

#### **Automate key company secretarial processes:**

Eliminate manual input across routine filings such as confirmation statements and EIS certificates.

**Enable a new service model:** Develop a confident, structured, and chargeable company secretarial offering that clients value.

**Increase operational efficiency and accuracy:** Reduce time spent on repetitive tasks while minimising the risk of errors.

#### **Support investment-related compliance:**

Provide an end-to-end tool to manage pre-emption processes, shareholder communications, and documentation for funding rounds.



### Solution:

CB Reid adopted Kudocs to digitise and automate its company secretarial function. Initially introduced for startup clients requiring EIS support, the tool quickly proved its broader value. The team worked closely with Kudocs to develop automated workflows for confirmation statements – previously a multi-step, disjointed process involving multiple systems.



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### Results and outcomes:

Kudocs' flexibility allowed CB Reid to set up internal review processes, client approval options, and automated filings to Companies House. This reduced manual oversight and sped up turnaround times. The firm also began running investment rounds through Kudocs, managing pre-emption processes and shareholder resolutions more efficiently. In parallel, CB Reid restructured its billing model. By introducing standardised pricing for company secretarial services – previously undercharged or bundled into other fees – the firm was able to both recover costs and grow revenue.

**Additional revenue:** Adopting Kudocs has enabled CB Reid to increase its company secretarial service line ten-fold.

**Service delivery transformed:** The firm now confidently offers and charges for company secretarial support as a standalone, structured service – something it previously handled with less confidence..

**Client experience enhanced:** Clients receive a modern, streamlined service with fewer delays, and the Kudocs platform provides transparency and responsiveness, especially during investment rounds..

**Time and resource savings:** EIS certificates and other documentation can now be created, signed, and distributed in minutes, saving significant admin time.

**Increased startup support:** CB Reid can now run entire investment rounds for early-stage companies, providing cost-effective company secretarial support and reducing reliance on external firms.

### Conclusion:



CB Reid's adoption of Kudocs has empowered the firm to transform its company secretarial offering – from a manual, low-priority task into a valued, revenue-generating service. Automation has not only saved time and reduced risk but also enabled the firm to better serve startup clients with scalable, tech-enabled processes. As CB Reid continues to grow under a national practice umbrella, tools like Kudocs are key to maintaining its innovative, client-first approach.



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