



Case Study

CLIENT



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With a large and diverse company secretarial (cosec) client base, including multiple group structures with numerous entities. ZEDRA's Manchester-based cosec team faced growing pressure to manage high volumes of filings and compliance tasks efficiently and accurately.



ZEDRA is a global specialist provider of Active Wealth, Corporate & Global Expansion, Funds & Pension & Incentives services. ZEDRA has a strong client-first ethos and supports individuals and corporates with complex and evolving needs across locations throughout the UK, Asia, the Americas & Europe.

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Challenges faced:

ZEDRA's cosec team was looking for a way to better manage its portfolio and avoid operational issues. Maintaining accurate records became increasingly challenging, with version control challenges and inefficiencies in retrieving up-to-date documents.

As client numbers grew, so did the administrative burden. Tasks such as preparing confirmation statements, issuing new shares, updating director & shareholder information and maintaining registers took significant time. Automation was a priority for the team to scale efficiently and focus on strategic growth and client service.



Client Objectives:

ZEDRA aimed to reduce the time spent on repetitive cosec tasks while improving data accuracy. This would enable it to expand its business and further improve its client service.



Solution:

Kudocs was the ideal solution due to its legal-grade compliance and intuitive design. The platform centralised and automated a wide range of cosec tasks, transforming ZEDRA's operational approach.

ZEDRA's cosec team now uses Kudocs for all its cosec needs, including:

- Providing corporate officer services
- Providing and managing registered office services
- Confirmation statements
- Companies House filings
- Director/shareholder changes
- Share issuance and maintenance of up-to-date registers

ZEDRA's cosec team highlighted Kudocs' intuitive user experience as a standout feature. It is straightforward to onboard new staff and the easy-to-generate registers proved especially valuable for corporate clients requiring fast turnaround.



Results & outcomes:

Time savings: Kudocs reduced the time taken to complete certain tasks by up to 70%. For instance, confirmation statements that once took up to 20 minutes now take under 5 minutes.

Improved accuracy: Real-time updates and a centralised database eliminated issues with outdated documents and manual errors.



Growth enablement: With operational efficiency vastly improved, ZEDRA could dedicate more resources to client engagement and business development. The firm has already grown its cosec practice thanks to the capacity unlocked by Kudocs.

Enhanced client delivery: Kudocs enabled quicker responses and seamless service - both of which are key to ZEDRA's reputation as a trusted partner.

If ZEDRA's cosec team was asked about Kudocs by another corporate services firm, their response would be:

"The amount of time saved is so valuable - we're seeing the clear benefits. Give it a go, you won't regret it."

Conclusion:

ZEDRA's experience demonstrates the transformative power of legal-tech in the company secretarial space. By adopting Kudocs, the team streamlined operations, improved service delivery, and unlocked growth potential.