



## Case Study

# TDM Group helps Sopher + Co maintain business as usual during the pandemic

### Company profile

Sopher + Co is a chartered accountancy practice with offices in Mayfair, central London, and Borehamwood, Hertfordshire, where it was established as a family business in 1975. Clients are, typically, high net worth individuals and owner-managed businesses.

The Sopher + Co team takes pride in providing support that goes beyond tax and accounting compliance. Through its private office offering, the practice provides a one-stop shop for services such as will writing and lasting power of attorney, as well as HR resources to help clients meet their obligations as employers.

Sopher + Co has an innovative approach to technology, adopting new solutions where they bring strategic advantage and increase efficiency. The team are equipped with tools such as accountancy and audit software that enable high levels of automation and free up resources for building client relationships.

Clients, too, are encouraged to embrace change and submit their business records digitally, using online bookkeeping software. As a result, the practice is taking the Government's continued drive to Making Tax Digital in its stride.

### A can-do attitude

Increasing reliance on IT requires the support of a partner who can help ensure technology is aligned with strategic business goals. Sopher + Co began the search for such a partner four years ago.

Chief Operating Officer Sanjay Bathija comments, "The culture of our potential technology partner was important to us. We're passionate about the work we undertake for clients. We sought a partner who would be equally committed and proactive in helping us achieve true business value from our investment in technology. We found a good fit in TDM Group and have been impressed by their can-do attitude ever since."



Open and transparent in its own dealings with clients, the practice appreciated TDM Group's business-focused approach in dealing with technical challenges, always starting with the question of how the business would benefit.

### How TDM Group supports

**SOPHER + CO**  
Chartered Accountants

#### TDM Group and Sopher + Co: a strong partnership

- Right from the start, TDM Group has gone beyond technical support to become a strategic partner to the business
- Sopher + Co's ambition to build a modern, dynamic practice is enabled by TDM Group's experience and knowledge of IT best practice
- Agile IT resources help the practice to adapt dynamically to meet challenges such as the Covid-19 pandemic



## Thinking outside the box

Successful IT initiatives in the intervening years have included improvements in the overall network infrastructure and security to align IT resources with business needs and goals, as well delivering a better experience for Sopher + Co users. To support greater collaboration across the team, TDM Group has also assisted in a recent migration from Skype telephony to Microsoft Teams.

Sanjay values the regular monthly meetings with TDM Group, as being more than just an opportunity to discuss any technical issues and housekeeping, "It creates a space for strategic, blue sky thinking. We value the way that TDM Group bring their experience of different industries and knowledge of best practice to our business in helping us to try new approaches, especially in the present surreal times! Their fresh thinking helps set us apart from other accountancy practices."

## Remote working accelerated

Although no one could have envisaged the scale and impact of the Covid-19 pandemic, Sopher + Co and TDM Group had factored in extra flexibility right from the start in planning infrastructure developments, thinking forward on how best to protect business continuity.

This foresight meant that the practice was ahead of many accountancy firms in already implementing the technology to permit homeworking. TDM Group had implemented a solution to support remote working through a virtual private network, with multifactor authentication to safeguard valuable client and business data. This environment was ramped up very quickly to allow all users to work remotely.

Sanjay reflects, "If the pandemic had to happen, in many ways it couldn't have happened at a better time for us. It accelerated what we were already doing in enabling remote working. Before the pandemic, around 50% our staff could log in and work from home. TDM Group had a very small window to work in, but in a matter of days we were able to flick the switch for the other 50% of the team, to enable everyone to work from home."

With Sopher + Co users able to maintain their productivity while working remotely, it's 'business as usual' and, perhaps surprisingly in these troubled times, the practice has even taken on more clients.

Sanjay explains, "We are ahead of our counterparts, who in some cases are unable to service their clients during this lock-down period. In contrast, we are here for our clients who need us more than ever - and we are actually picking up new work."

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Sanjay Bathija, Chief Operating Officer, Sopher + Co

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## Constantly improving business resilience

It is likely that Sopher + Co staff will continue working remotely to some extent even when Covid-19 subsides. Sanjay comments, "Employees tell us that, ideally, they would like to split the working week between the office and home. This would help their work-life balance, without sacrificing social contact and collaboration."

He adds, "As an employer, being able to offer flexible working helps in recruiting and retaining good people. Meanwhile, for our business, it brings the attractive prospect of reducing our running costs."

TDM Group is now working with Sopher + Co to enable the transition from the current on-premise infrastructure to the cloud, as always taking a holistic view of the business and the impact of technology, rather than focusing solely on technical considerations, important though these are. This will enable employees to access practice systems from any location and at any time, at a predictable monthly cost.

Other benefits for the firm of moving to cloud-based solutions include increased scalability to support business growth, with reduced complexity and a stronger focus on user experience. Sopher + Co continues its relationship with TDM Group to deliver and support the right business solutions.

Find out more

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