



# Building a practice of the future with **Xero Tax**

How one practice is streamlining compliance  
and future proofing their business

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# Meet the partner: **DSK**



**Paras Shah**  
Workflow Manager  
DSK Partners

Over an impressive 70-year history, south London's DSK Partners has been through many changes as a practice, from mergers — the most recent in 2020 — to transforming into a cloud-based firm. "In the last 10 years we've been going through this process of digitalisation," says workflow manager Paras Shah. "We got our clients on to Xero. We're trying to use all the tools out there that Xero provides to get us paperless and to work without needing to be fully anchored to a desk."

DSK prides itself on being "a practice of the future", embracing innovation and new ways of working — with flexibility and collaboration a core motivator for this. "We are always looking towards making workflows more efficient and experimenting with tools that allow us to achieve more, along with better engagement with colleagues and clients," says Paras.

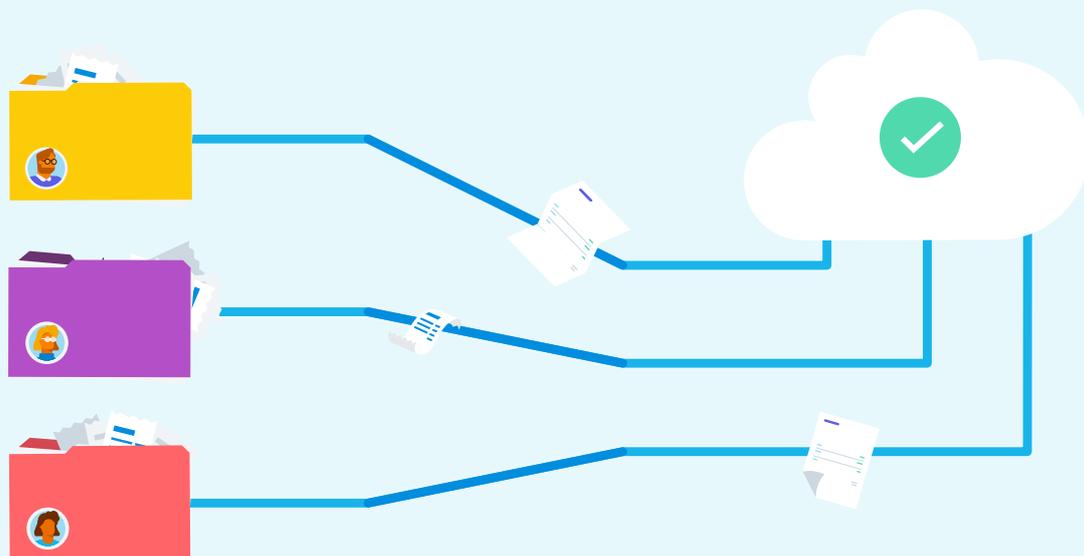
# Streamlining compliance

Over the past two years DSK has been on a journey to streamline its compliance processes. “Before that we were a typical accountancy firm where a couple of people will start doing everything in the last few months before the submissions deadline, working until midnight, pulling help from elsewhere — which means things get stretched,” says Paras.

Xero Practice Manager has allowed them to increase job visibility and, by upskilling junior staff, they can now allocate tasks to different teams and share the workload depending on capacity. “With Xero Practice Manager we’ve got live data and everyone has got to login and update

their status and their job notes, so if I’m not around one day and the client calls anyone can pick up the phone, look at my notes and see where that job is at.”

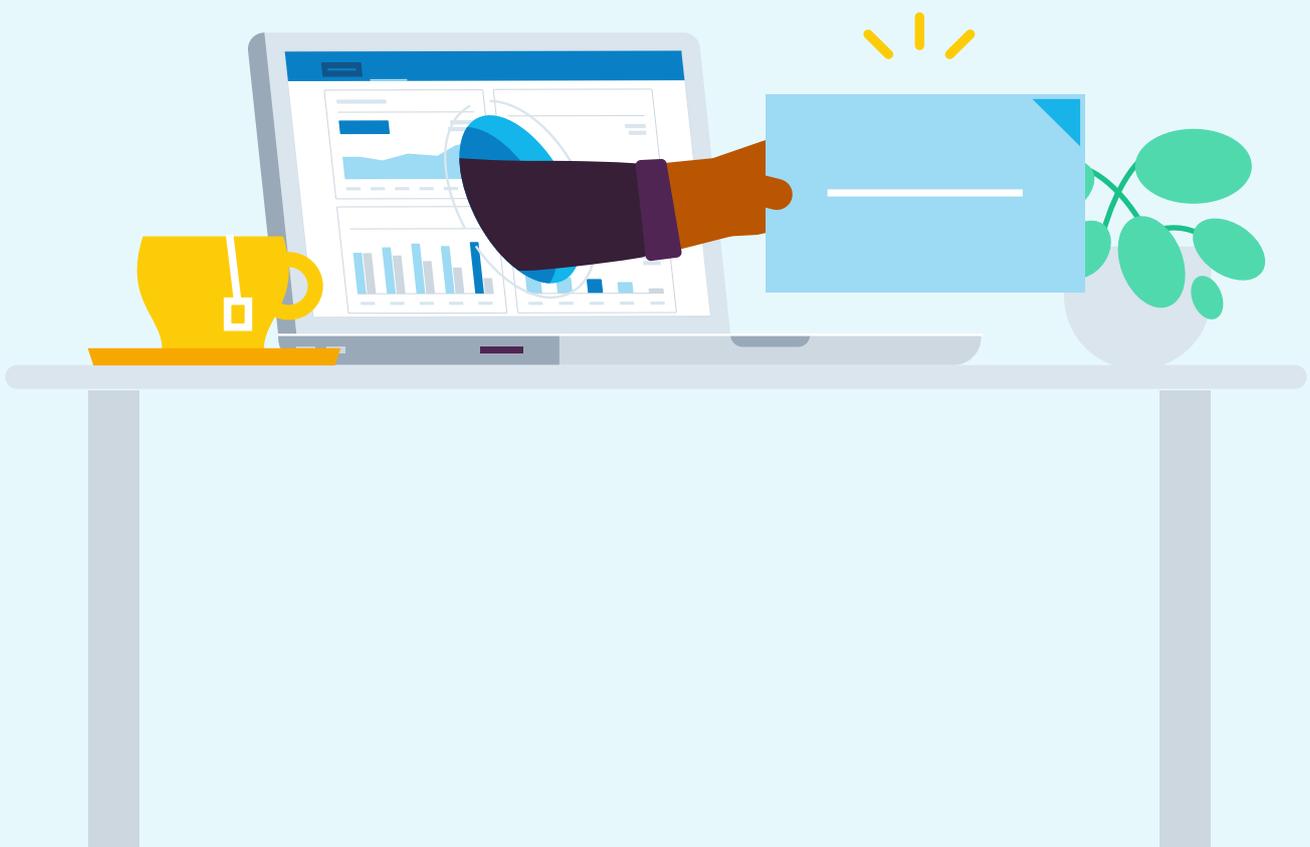
Alongside this Xero Workpapers has reduced paperwork and enabled easier collaboration. “The review mechanism means I can prepare a workpaper, a manager can review it and a partner can sign off on it, and it’s all cloud based with notifications. Before I’d have to be in a physical office, print it out, pass it on, then if I needed to change something I’d need to reprint it. All this has disappeared.”

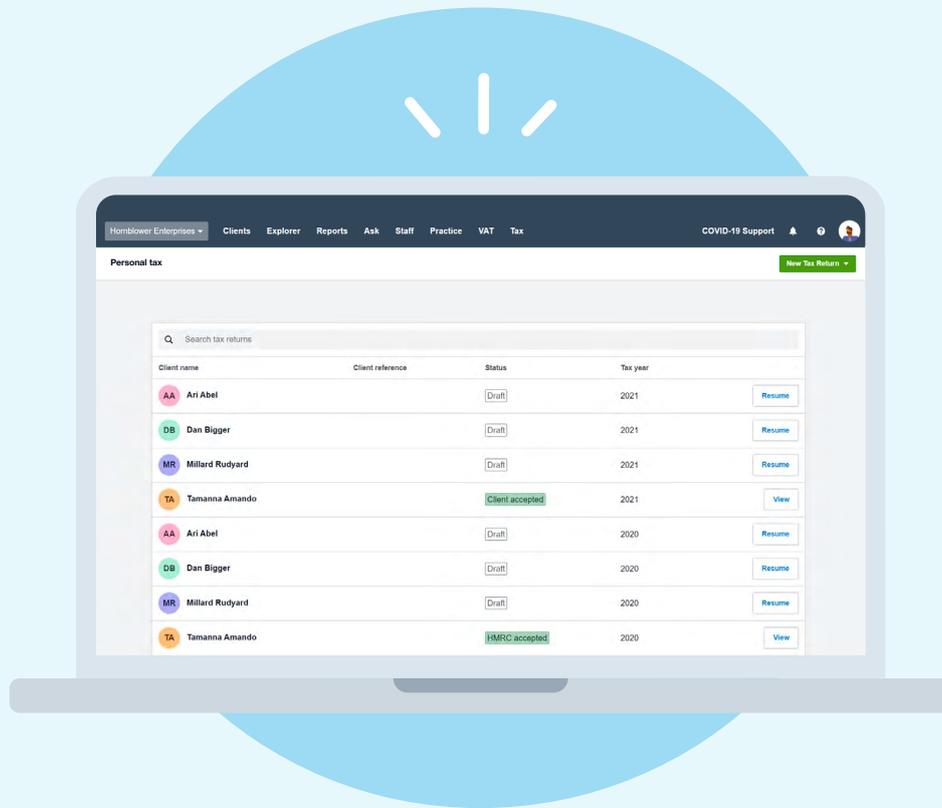


# Xero Tax: the missing link

While Xero Practice Manager and Xero Workpapers had already put DSK in good shape to manage its compliance work, the practice was looking for the final piece in the puzzle to allow them to go completely cloud based for personal tax. “Generally, we find traditional desktop software clunky and it needs a lot of time investment,” says Paras.

With close to 1800 personal tax clients, the decision to test the new personal tax feature of Xero Tax was an easy one. “I love the freedom that cloud software offers,” says Paras. “We’re always on the look out for tools that allow us to monitor and manage workflows and allow collaboration between team members, and to future proof ourselves as a practice.”





# What is Xero Tax?

Xero Tax is cloud based accounts production and tax filing software, built to help you streamline compliance by making it faster to prepare and file accurate accounts and tax returns.

Already available for company accounts and tax, we are now excited to launch personal tax and sole trader accounts production, meaning you can use Xero Tax for both companies and individual clients. Xero Tax is available at no extra cost, to all accountants and bookkeepers on the Xero partner programme.

# An intuitive solution

**“ So far I think I’ve definitely saved 25% of time, and going forward that might get upgraded to 50%.”**

As the first person to use Xero Tax for personal tax in his practice, Paras got to grips with it immediately. “On that first use I was able to go in and do what I needed to do,” he says. “I did it on our other desktop software and then I did it on Xero Tax, and it’s so much easier. It feels like a step by step process.” He has already noticed significant time savings. “So far I think I’ve definitely saved 25% of time, and going forward that might get upgraded to 50%.”

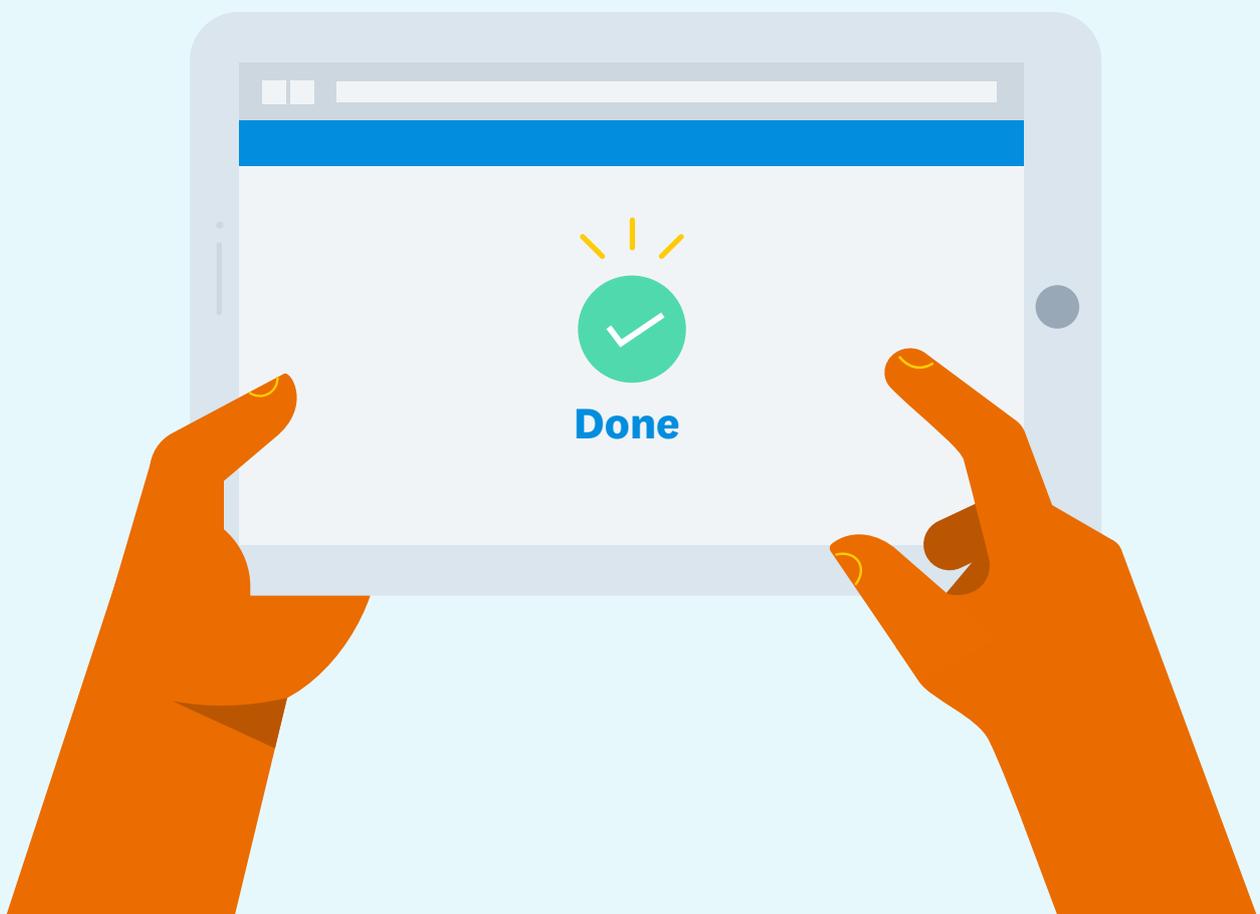
Its intuitive design and easily accessible resources means DSK can get junior members of staff using Xero Tax to help lighten the load with personal tax returns. “It’s going to be so simple to train people up,” says Paras. “I feel that anyone can start using Xero Tax and find it intuitive straight away.”

A handy comparative tool in Xero Tax allows the user to see previous years’ entries underneath the current year’s data, simply by clicking a button. “I’ve done previous years’ returns on it to see how the comparison tool works, closed them off and then taken it forward,” says Paras. “And even doing that was such a quick process.”



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# Collaboration made easy



Through using Xero Practice Manager, Xero Workpapers and Xero Tax together, the practice has solved a previous pain point: the ability to share the workload and be able to easily move a tax return to another team member where they may have capacity.

Spreading the workload across more staff members will help eliminate time-sucking bottlenecks and enable growth. “It shifts the practice’s service lines,” says Paras. “Instead of me wasting time trying to do the data entry and getting stuck in the little things I can spend more time with the client where it’s required and give them a better service that way.”



# Looking ahead: Making Tax Digital

The introduction of Making Tax Digital for VAT was a driver for DSK in moving its client data onto Xero — and with MTD for Income Tax Self Assessment now on the horizon too, Xero Tax offers the chance to be even better prepared. “With MTD for ITSA looming over us, we like to be proactive and start finding solutions to how best we can adopt this for ourselves and our clients,” says Paras. “When you’re proactive and you’re already there ready it gives you time to think as opposed to being reactionary and firefighting.”

His advice to other accountants is to take the time to review their processes sooner rather than later. “Don’t be stuck trying to get your head down doing the work. Try and take a step back and see how you can make it better. I think that’s just as important,” he says. “You might need to reach out to Xero for some help, or see how other people are doing it, but it’s good to see what’s happening and start preparing yourself.”





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