



## Microsoft Customer Solution Customer Solution Case Study

SHADDICK & SPENCE

### Office 2007 and Windows Vista Prove Less Taxing For Shaddick & Spence

#### Overview

**Country or Region:** Australia

**Industry:** Finance

#### Customer Profile

Based in Melbourne, Shaddick & Spence is a firm of specialist tax advisors that is consistently ranked among the top 10 tax advisory firms in Australia.

#### Business Situation

Shaddick & Spence wanted to improve the productivity and efficiency of administrative staff.

#### Solution

By deploying a pilot project involving Windows Vista and Microsoft Office 2007, Shaddick & Spence discovered a suite of tools that simplified internal processes and administrative tasks and could scale to meet the company's growing needs.

#### Benefits

- Saved three hours per week for each user.
- Improved user experience.
- Enhanced the quality of reports and presentations.
- Increased staff productivity.
- Faster and more comprehensive searches.

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*Christine Salau, Office Manager, Shaddick & Spence*

Administrative staff at Shaddick & Spence, one of Australia's top taxation advisory practices, rely heavily on their office software for tasks such as writing documents, scheduling meetings and creating client presentations. Staff wanted to investigate ways they could improve productivity and internal processes. Microsoft partner Total Network Support developed a pilot project that demonstrated how these issues could be addressed using Microsoft Office 2007 running on the Windows Vista operating system. Independent analyst BearingPoint found that by simplifying user interfaces, enhancing search functionality and allowing greater personalization, Shaddick & Spence could achieve noticeable operational benefits that could save each clerical staff member three hours each week. This time can now be spent on value-adding tasks such as creating more impressive and meaningful presentations that will lift the company's image in the marketplace. The ability to achieve results quickly and efficiently will enhance customer service, improving the company's reputation.



## Situation

Although a small firm of 10 employees, Shaddick & Spence has consistently ranked within the top 10 Australian taxation practices since its founding in 1993. Its partners have been listed in the *International Tax Review's* top 10 tax consultants in Australia. In September 2006, the same publication acknowledged Shaddick & Spence as the tax firm in Australia that added "the most value for clients in Australia after the Big Four".

With expertise in corporate and international income tax consulting, Shaddick & Spence advises a large number of Australia's top 100 companies. Such high-profile clients expect exemplary service, and Shaddick & Spence's excellent reputation has grown from its ability to meet client expectations. Like so many companies today, Shaddick & Spence's ability to deliver depends on its technology being able to handle the workload.

"We rely heavily on our computer systems," says Christine Salau, Office Manager of Shaddick & Spence. "Our email, our databases, our office software – it's all essential for the day-to-day running of the firm. If something isn't working, we may as well go home."

The company was using Microsoft Office 2003 for the majority of its administrative tasks. While the software had all the functionality staff required, the company was keen to investigate ways staff could improve productivity and streamline internal processes.

"An important part of my job is organizing internal meetings," says Salau. "A partners' meeting, for example, might have me going through several people's calendars to find a time that suited everyone. This could be thoroughly time consuming. I would have to

flick from screen to screen before heading back to the original calendar."

Staff also wanted to find a faster, more efficient way of searching through emails.

"I'm often asked to search for emails that were sent some time ago," explains Salau. "I noticed that the 'find' function in Outlook 2003 was sometimes slow returning results."

While staff enjoyed using PowerPoint to create presentations, they found some of the product's drawing and charting features cumbersome, and spent too much time creating and editing presentations.

"For the time we spent, we felt we should have been able to create more professional results," says Salau.

"It was obvious we weren't being as efficient as we could."

## Solution

Microsoft Partner Total Network Support (TNS) had a strong long-term relationship with Shaddick & Spence and approached the company to be one of the first Australian customers to test Windows Vista and Microsoft Office 2007.

"Shaddick & Spence is a genuine innovator," says Loryan Strant, Senior Systems Consultant at TNS. "It's a technology savvy company and we knew staff had been looking to change the way they worked, so they seemed a perfect candidate to trial the new Microsoft products."

TNS developed a pilot project that involved deploying Windows Vista and Microsoft Office 2007 for administrative staff. Specifically, the project focused on the 2007 versions of desktop applications Outlook, Excel,

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PowerPoint and Word and the new reliability and security capabilities of Windows Vista.

“We chose Total Network Support based on their excellent credentials and references, and it’s proven to be a great partnership,” says Salau. “When they suggested the pilot project, we jumped at the chance.

“Total Network Support supported us throughout the program,” says Salau. “If I had trouble, they came in and helped. They spent a great deal of time ensuring we understood the new products and could take advantage of all the features.”

### Benefits

As part of the pilot project, Microsoft engaged independent business analyst and consultant BearingPoint to measure the potential impact of the Microsoft solution.

BearingPoint reported that the project demonstrated a number of measurable benefits and administrative savings.

In all, BearingPoint calculated that each administrative staff member at Shaddick & Spence could save more than three hours per week using Office 2007 and Windows Vista. That’s a saving of at least A\$4,000 each year.

### Improved Productivity With Better Desktop Tools

BearingPoint discovered that the new scheduling features in Outlook 2007 allowed administrative staff to arrange partner appointments and meetings in a quarter of the time (7.5 minutes), compared to the 30 minutes required previously. Overall, this equated to a saving of 45 minutes per week. Searching for information in email databases was likewise improved, dropping from an average of one minute to 10 seconds.

“In Outlook 2007, I can open multiple calendars, one on top of the other, and easily see what people are doing and when they’re available,” says Salau. “I’ve also found that the search function is a vast improvement on Outlook 2003 – it’s incredibly fast and accurate, even highlighting where the term you are searching for appears in the email. This enables the user to sort the results very quickly.”

The project also demonstrated that the difficulties users were having with PowerPoint could be eliminated by SmartArt, the new graphics and diagramming engine that runs across all clients in the Office 2007 suite.

“The choice of graphics in PowerPoint 2007 is fantastic,” says Salau. “Each slide looks so much better with much less effort. As you move the cursor over the box you’re creating, a floating toolbar appears. It only requires a short hand movement to select the correct font and formatting. Everything you need is there and contextualized for what you’re trying to do.”

SmartArt also proved useful in Excel for graphically representing the information contained in reports.

“In the past, our management reports were just plain old Excel spreadsheets,” says Salau. “Being able to visually represent the data makes the information more immediately accessible. I also used conditional formatting to instantly indicate performance trends, which was a great visual aid for anyone skimming the report.”

BearingPoint found that the time staff spent creating PowerPoint presentations dropped from 10 minutes to 6.5, saving 14 minutes a week.

“For us, this project wasn’t about saving money,” explains Salau. “It was about

increasing staff productivity and efficiency so we could focus on more value adding tasks such as improving customer service and making our reports and presentations more professional and accessible.”

### **Ribbon Toolbar Increases Productivity by 33 Percent**

The new Ribbon interface in all Office 2007 desktop applications, which replaces the traditional toolbar, allowed users to navigate documents more easily and also made applications’ various features and functionality more accessible.

BearingPoint found staff were 33 percent more productive when using desktop applications in Office 2007. This was mostly attributed to the new Ribbon toolbar.

“When I first began using Office 2007, everything was very challenging,” says Salau. “But two months later, I love it. The Ribbon interface is a real step forward for Microsoft. Every day I learn more about what it can do and how it can help me work more productively and effectively.”

BearingPoint also identified benefits in unexpected areas. The improved PDF conversion features of Word 2007 saved 14 minutes a week. The simplicity of the feature will allow all users to create their own PDF files, rather than waiting for administrative staff to do it. This feature would save an estimated 74 minutes per week and remove production bottlenecks.

### **Stable, Reliable Operating System**

Microsoft Office 2007 integrates with the Windows Vista operating system, enhancing the capabilities of features such as search. “I was incredibly impressed by the integrated desktop search functionality in Windows Vista,” says Salau. “It searches all the files on my computer as well as those on the network

- it astounds me how quickly it can find things.”

Strant adds: “Windows Vista constantly indexes documents in the background so when a user needs to find something, the operating system already has a good idea of where it is. This is a real performance booster for administrative staff at Shaddick & Spence, who often need to locate emails or documents for partners at short notice.”

The platform is also highly customizable, aiding productivity by giving users a greater say in how they configure their desktop.

“I’d never really thought much about an operating system or spent time learning its intricacies,” says Salau. “With Vista, everything is so accessible, which has made me keen to look at what I have available to me. It’s easy to understand how the operating system works and to customize it to ensure it’s working for me, rather than me working around it.”

“We didn’t realize the breadth of the operational improvements we could achieve when we trialed Office 2007 and Windows Vista,” says Salau. “It’s been a genuine eye-opener.”

### **Enhanced Security with Windows Vista**

“The security of our electronic files is an extremely important issue for us; we need to be absolutely confident our documents are secure,” says Salau.

Windows Vista has a range of advanced security features that are ideal for businesses like Shaddick & Spence.

New security features in the operating system include:

- User Account Control, which allows administrators to restrict users’

permissions to make drastic changes to the system while ensuring most applications can run.

- A powerful firewall that can be centrally configured using Group Policy settings.
- Windows Service Hardening that restricts the ability of malware to attack the system.
- Network Access Protection that can be configured to prevent computers from accessing the network unless they have current security updates or virus signatures.

Shaddick & Spence's seven tax professionals all use Notebooks when working from home or offsite at client premises.

"Microsoft has taken a huge step forward in Windows Vista," says Strant. "The fact that the operating system is locked down by default will improve the ability of organizations to secure critical data."

#### **Windows Vista Easier to Support**

Windows Vista can detect application problems and restart services without having to reboot the computer; in most cases users will not even notice there was a problem. Improved error reporting helps developers fix common problems, leading to even more stable software in the long run. Windows Vista can even help detect and recover failing hard disks and memory.

"The system rates itself on its own performance," says Strant. "From a support perspective, this makes it very easy to figure out which parts we need to upgrade or attend to, making it easier for us to provide tailored, fast support to Shaddick & Spence."

He adds that the increased functionality of Vista will also make it easier to deploy patches to computers and create images of Notebooks and PCs for easy restoration in the event that the hardware fails or the device is lost or stolen.

"The ability to create images without needing to use third-party imaging software is a huge plus for us," he says,

#### **Staff Satisfaction and Organizational Improvement**

The pilot project also demonstrated some broader benefits. Task management and organization was enhanced, which led to improved customer service.

"Microsoft Office 2007 running on Windows Vista has saved me time and effort and made my job easier in more ways than I could have imagined," says Salau.

Similarly, by reducing the time spent on the tedious aspects of creating presentations, staff were able focus on the creative aspects, improving the quality of the presentations and Shaddick & Spence's image in the marketplace.

"If I can achieve results quickly and efficiently then everyone's workload is reduced – it's a great solution all round," says Salau.

## For More Information

For more information about Microsoft products and services, call the Microsoft Sales Information Center at (800) 426-9400. In Canada, call the Microsoft Canada Information Centre at (877) 568-2495. Customers who are deaf or hard-of-hearing can reach Microsoft text telephone (TTY/TDD) services at (800) 892-5234 in the United States or (905) 568-9641 in Canada. Outside the 50 United States and Canada, please contact your local Microsoft subsidiary. To access information using the World Wide Web, go to: [www.microsoft.com](http://www.microsoft.com)

For more information about Total Network Support products and services, call (613) 9682 9300 or visit the Web site at: [www.tns.com.au](http://www.tns.com.au)

For more information about Shaddick & Spence products and services, call (613) 9650 4451 or visit the Web site at: [www.shaddickspence.com.au](http://www.shaddickspence.com.au)

## Microsoft Office System

The Microsoft Office System is the business world's chosen environment for information work, providing the programs, servers, and services that help you succeed by transforming information into impact.

For more information about the Microsoft Office System, go to: [www.microsoft.com/office](http://www.microsoft.com/office)

## Microsoft Windows Vista

Windows Vista can help your organization use information technology to gain a competitive advantage in today's new world of work. Your people will be able to find and use information more effectively. You will be able to support your mobile work force with better access to shared data and collaboration tools. And your IT staff will have better tools and technologies to enhance corporate IT security, data protection, and more efficient deployment and management.

For more information about Windows Vista, go to: [www.microsoft.com/windowsvista](http://www.microsoft.com/windowsvista)

### Software and Services

- Products
  - Microsoft Office 2003 Professional
  - Microsoft Windows Vista

- TBC
- TBC
- TBC

### Hardware

### Partners

- Total Network Support

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