



Moran and Partners  
Chartered Certified  
Accountants

# Moran and Partners switched to Xero in order to give their clients the best service

Get started with Xero



# Meet the managing partner: Moran and Partners



**Paddy Moran**  
Moran and Partners

With a practice that dates back to 1976, Dublin's Moran and Partners have weathered a lot of change in the accountancy industry, but never veered from their ethos – to consistently provide the best service they can for their clients.

Paddy Moran first joined the practice in 1986, and is still in the same building 37 years later. What does he still love about his job? “The simple answer is helping people,” he says.

“That’s the most appealing thing – both in times of growth and expansion as well as in times of difficulty ensuring that they retain and maximise their hard-earned wealth. Every day is different and I’m still learning.”





Paddy Moran, Joe Finnegan and Michael Keogh Moran and Partners

Paddy works alongside two fellow partners, Joe Finnegan and Michael Keogh, and the practice has an additional team of six.

They have a client base of over 250, with businesses ranging from simple tax returns to significant audit clients. “We ensure a senior partner directs each new client engagement regardless of the size” says Paddy.

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# A simple but powerful solution

In order to keep providing the best service for their clients, the practice is always educating itself on the latest developments in their industry.

Despite starting his career before computers even played a major role in accounting (“my job was to manually complete a thick, hard-copy nominal ledger”), Paddy has embraced innovation.

*“We’re big advocates of technological evolution.”*

In 2016, that meant moving the practice over to cloud-accounting software. Until then they had primarily been using SAGE and TAS desktop software.

“As we built up business volume, paperwork was becoming a huge issue. We had boxes and boxes of lever arch files and needed separate storage to our office premises. This process has now become archaic”.



**“The first thing that attracted me to Xero was the simplicity. The webinars and educational material to upskill yourself was set out in a way that felt achievable with a busy life. I was able to digest it all. ”**

At the same time, Paddy was hearing about the benefits of cloud-systems from both clients and industry colleagues — with one recommending Xero. “I started looking into it and immediately liked what I saw,” says Paddy. “The first thing that attracted me to Xero was the simplicity.”

“The webinars and educational material to upskill yourself was set out in a way that felt achievable with a busy life. I was able to digest it all.”

# Demonstrating the benefits

Once he'd convinced his fellow partners to make the switch, they came up with a plan for migration, segmenting their client base according to size and starting with those most open to the change.

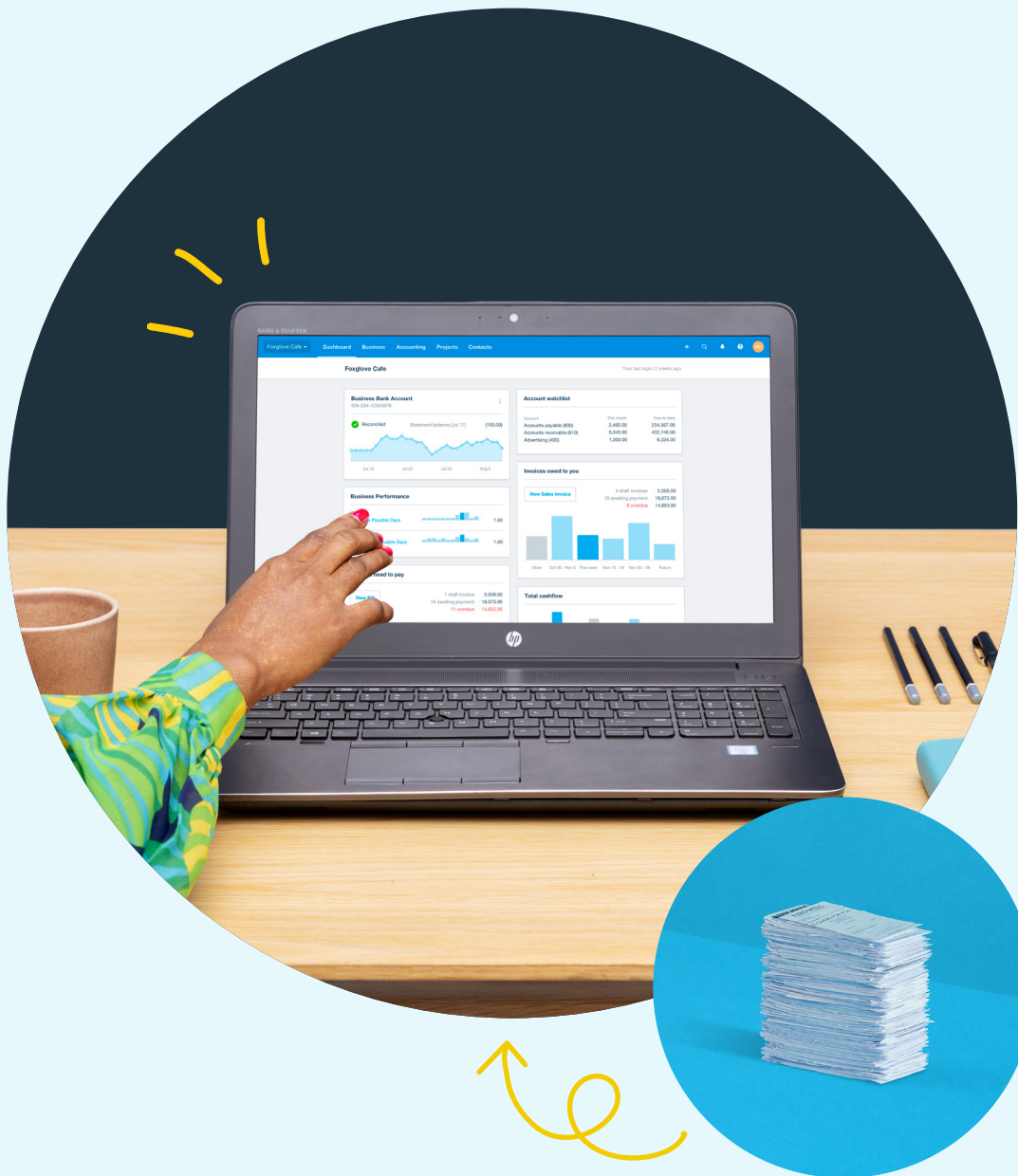
"I found out quickly that not everyone could see what I could see, and we would need to spend time convincing people of the benefits. Some people don't want to be the first to try something, and you can't fault them for that. Some were concerned about security, so wanted to know how their data would be protected."

To demonstrate Xero to clients they ran parallel systems for two months to show the benefits of A versus B. "The obvious benefit is the access to real time financial data, from anywhere at any time," says Paddy.

*"Xero gives clients visibility, and a sense of touch and feel in their business. They can take control of the financial side and own it."*







With all the challenges that small businesses have been through and are still facing, up-to-date financial data has never been more vital. “We saw throughout Covid the benefit of timely information for management to make informed decisions,” says Paddy. “If I’m coming back to someone nine months post-year-end with financial information, they might say, this is great information but my business closed two months ago.”

With automated invoicing and integration with online payment systems, Xero also makes it quicker and easier for businesses to get paid. “They’re not chasing all that paperwork and having admin tasks eat into their personal time,” says Paddy.

# Smarter working for you and your clients

As the benefits of Xero became clear to clients, word spread – and more wanted to make the switch.

“Over a period of time we’ve converted around 98% of our clients,” says Paddy.

It’s not just clients that are working smarter thanks to Xero – but Moran and Partners, too. By automating routine tasks and providing greater flexibility, Xero has streamlined their processes. “There is no question that the benefit is significant,” says Paddy.

*“We’re probably a third more efficient across the day. That gives you the scope to assist better in other services, and to scale your business.”*

The cornerstone of their practice – personal relationships with clients – has also improved. “The bond is stronger,” says Paddy.

“The trust is stronger because clients are more familiar with the landscape and have taken ownership of their financial information.”





# Creating a future-proofed practice



It's not just about pleasing the current clients — but making sure their practice is attractive to future ones, too.

“New clients are young, they're tech savvy. They're not looking for me to produce a lever arch file in a meeting.”

Innovation is important for retaining talent within the practice, too.

*“Staff are getting more out of their work. They're enjoying it more and seeing the reward”.*



**“We do not regret in any shape or form that decision to move to Xero in 2016,” says Paddy. It’s the best software product I’ve seen in my career.”**

So what would he say to practices still on the fence about cloud-accounting, and nervous about migrating their clients across?

“Educate yourself, be familiar with Xero and its functionality and take your time on the migration. Do it in an orderly fashion and have it well thought out.”

Change can be daunting, but it’s necessary to stay ahead.

“We do not regret in any shape or form that decision to move to Xero in 2016,” says Paddy.

“It’s the best software product I’ve seen in my career. We’re not only happy with the product, but with the continued research and development that goes with it.”

That means they can continue their mission to offer clients the best possible service – now, and for many years to come.



Xero's **extensive product portfolio** continues to expand and is flexible enough to meet the needs of clients of all shapes and sizes.

**Speak to your account manager  
to find out more.**

