

# The Product Roadmap



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In April 2008, Wolters Kluwer UK Ltd acquired MYOB Accountants Division UK and MYOB (Ireland).

This brought together two of the strongest names in the accountancy software market, doubling our client base and increasing our resources, to uniquely position us as a new market force.

We appreciate the importance of this development for both sets of clients, and following the acquisition we have undergone a three month review of the combined software suites of both companies.

This is only the beginning of the process and over the coming months and years we will be embarking on a series of exciting developments that have started from this review.

Your contribution will be essential to help us define and realise the vision entailed in this document, and we look forward to delivering a truly innovative market leading suite of products that will revolutionise the way your practice works.

This document will introduce:

- The results of the review process
- The new suite
- The 'go-forward' products
- What this will all mean to our clients

# The Review

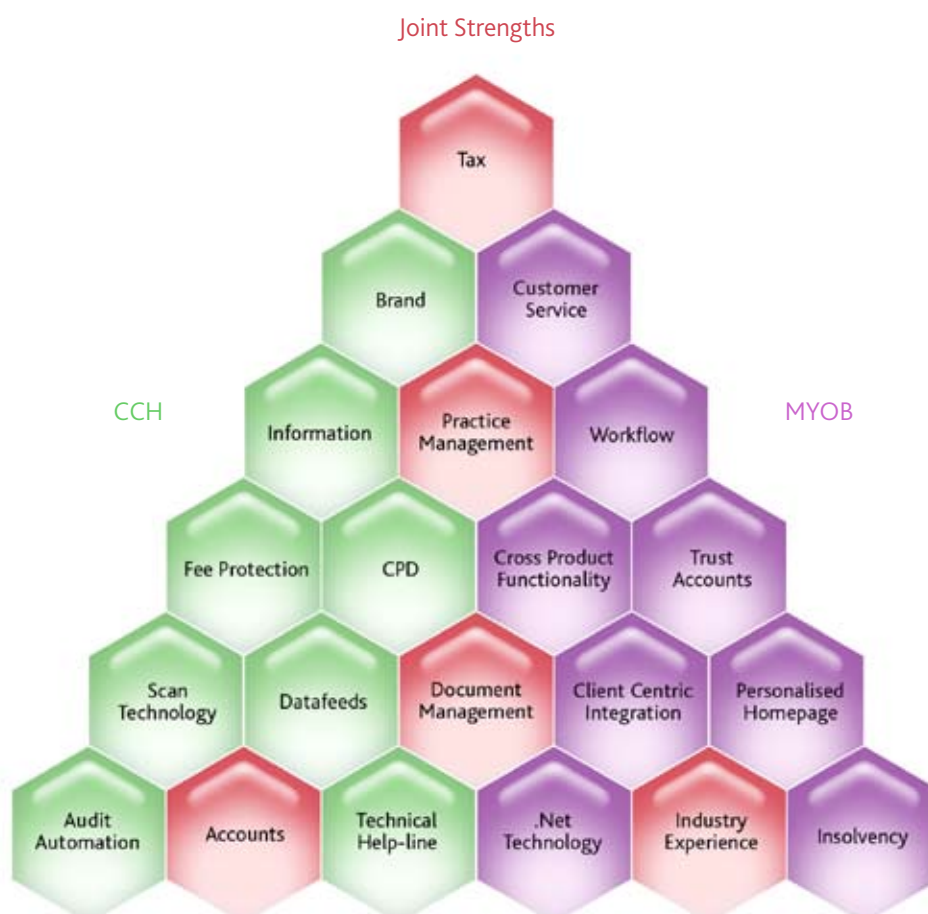
It is essential that the final Roadmap ensures CCH software is working towards a series of software solutions that support both your functionality needs and your technology needs.

With that in mind, the initial review focused on the integration of data through a single client database, so that information is shared seamlessly between the software. With this in place we can offer an integrated, future-proofed and best of breed suite that would be unique in the market.

As our review progressed it became increasingly apparent that the merging of CCH software and MYOB was a natural fit in more ways than just the software.

Both companies excelled in areas that would fit the gaps of the other, with our collective software offerings providing an expanded suite with more comprehensive functionality. Combined with our portfolio of areas such as information and fee protection, our vision of CCH offering a comprehensive range of accountant's solutions beyond just software took a big step forward.

The pyramid shows the strengths that each company brings.



## The new suite

During the last three month's review we have identified the functionality strengths of like-for-like products to ensure that we produce a genuine best of breed solution.

Certain existing products will provide the core technology of the 'go-forward' suite based on the results of this review. Throughout this process we have ensured that there will be no functionality shortfall as a result of the new product suite, so where a product is not going forward but has functionality strengths, that functionality will be incorporated into the final software build.

The image below shows the new CCH ProSystem Suite, a fully integrated system with cross-platform functionality that lets you control how you work.



**Central:** CCH Central is a flexible tool that runs throughout the CCH ProSystem Suite. From launching software applications to controlling the flow of information into the suite's single database, CCH Central provides:

**Personalised Home Pages:** The user-defined homepages available through CCH Central provide a personal view of the practice, ensuring that the information you need to do your job is at your fingertips. From key performance indicators, to day-to-day activity lists, you have the visibility to ensure the smooth running of your practice.

**Standardised Products:** The CCH ProSystem Suite is a comprehensive range of Client Service products that ensure that your practice has the in depth functionality and Client reporting it requires to work efficiently and professionally to support your Client needs.

**Productivity Tools:** All the tools share in common cross-suite functionality which works across all the appropriate programs, using data from the same database. Tools available range from mail merge, workflow, document creation, smart reports, smart tasks, client security and more.

The integrated CCH ProSystem Suite means that you will benefit from:

- Comprehensive reporting tools across the entire suite.
- No rekeying of Client data – one client database across the suite means that you only have to input information once. It doesn't matter where its input, that data is automatically updated throughout all products.
- Faster processing - less key strokes to complete tasks combined with real-time alerts and workflow across the entire suite.
- The latest technology working at the core – a fully integrated .net suite will be available from 2010

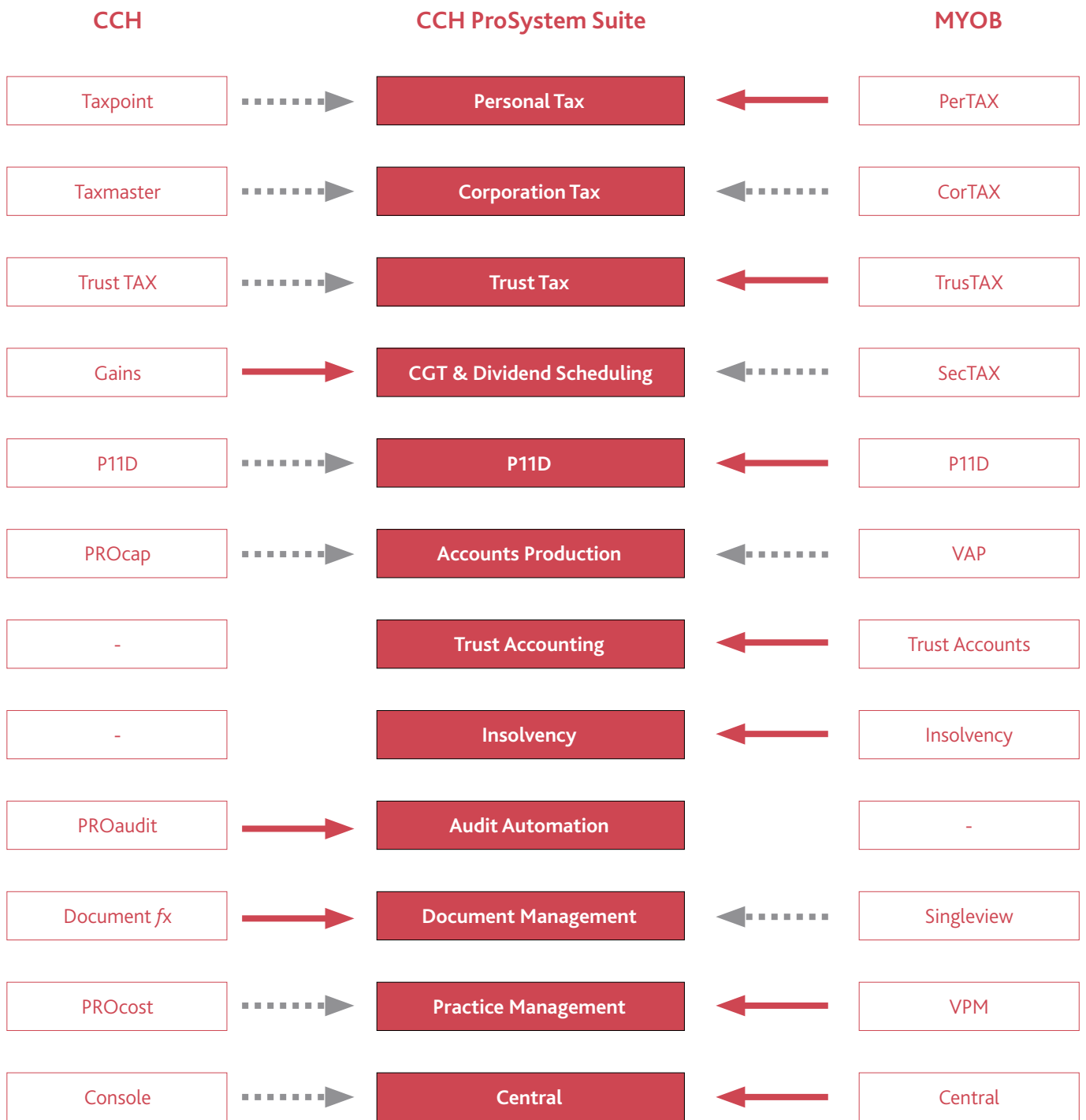
## The 'go forward' products

We have adopted a 'what it says on the tin' approach to the products, so all our software will be named according to the purpose that it serves your practice.

For example, PerTAX and TaxPoint will effectively be combined into CCH Personal Tax, which forms part of the CCH ProSystem Suite. Although the core technology will come from PerTAX, the gap analysis will ensure that none of the functionality of TaxPoint is lost.

Where we have overlapping products with no natural go-forward technology, they will be merged onto a new technology platform. A full gap analysis will be investigated to ensure no functionality is lost.

Opposite is a list of the core products, their naming conventions and where their functionality will come from.



←→ Core Technology

←→ Gap Fill

## How this will affect our clients

With the new Roadmap our main concern is ensuring that the process for our clients is as straightforward as possible.

Whether it's identifying the products you need, finding the right time to upgrade your suite, or the conversion of your client data, we will make sure that you aren't forced to adapt to our processes. We will work with yours.

### Client Data

One of the most frequent questions we have encountered is how we will transfer client data from existing software to the upgraded versions. We know this is a common problem for accountants transferring to new software, so our biggest challenge is ensuring that this isn't a problem for CCH and MYOB clients upgrading to the new suite.

A major benefit of the acquisition of MYOB is that although our vision has not changed, our capacity to deliver it has significantly improved. There is now an increased R&D budget and a stronger Product Development team. We are also investing in increased services resources to support you through the upgrade process.

With this resource in place, we are committed to providing like-for-like client data transfer that will result in minimal downtime with the highest levels of data accuracy, and currently have a team working towards making the process as seamless as possible.

### When can you upgrade me?

The most important point is that there will be ongoing support for the existing product ranges while there is client demand. We won't be working to a set switch-off date and trying to upgrade you to products that you aren't ready to use.

The decisions to upgrade to the enhanced suite is completely optional and can be at a time of your choosing. Just contact your Account Manager, talk through your requirements and set a time that suits you best.

We are expecting high demand for the enhanced product suite, so if you can upgrade sooner rather than later it is worth considering.

## What will this cost me?

We understand that no matter how good the intention, change can be a hindrance.

When we looked at the process for migrating clients to the enhanced CCH ProSystem Suite, we identified four areas of possible cost. Software, Installation, Conversion of data and Training.

On installation, where possible we will provide a FOC self-install option. Alternatively full on-site services will be provided, at our normal service rates.

### So we're offering:

**FREE** software upgrade on a like-for-like module basis *(Optional modules chargeable)*

**FREE** conversion of like-for-like data

**FREE** online compliance training for the first 6 months *(Additional training / consultancy will be chargeable)*

Which means that it's entirely possible that this process will be free of charge. Apart from any cost issue our main concern is ensuring your migration will be as straightforward and seamless as possible.

## What happens next?

In the introduction we mentioned that this is only the beginning of years and months of ongoing development, so we will be further refining our development plans.

As this happens we will be actively communicating these developments to you and also looking to gain your feedback on how we go forward.

- You will receive regular updates on when new systems are available and how to upgrade your software
- Your account manager will be in regular contact with you to discuss and answer any queries you may have
- We will be implementing Focus Groups for particular developments and will actively seek your involvement
- There will be combined User Groups across our product users, providing an independent forum for all our clients to discuss the software, the roadmap and the industry as a whole
- New newsletters updating clients on progress the progress of the Roadmap and other developments of interest
- National 'Way Ahead' Roadshows throughout October and November, discussing the Roadmap in more detail, providing case studies on upgrading your software and providing a unique forum to ask any questions you may have.

The Product Roadmap is about delivering a suite of products that works for our clients, not a suite of products that works for CCH software. This means that the most important input into the Product Roadmap will not come from us, it will come from you.

Please contact us and get involved to make sure that the end result is a truly innovative product suite that answers your demands.