

Maly IT Solutions

Case Study – PD Tax

Case Study: PD Tax

About PD Tax: Operating from Leeds and Manchester PD Tax provide specialist tax advice and guidance to clients across the UK. Drawing on significant experience gained in the big 4 consulting firms the team guide and advise their clients on ethical tax planning and problem solving.

The Challenge: Having grown significantly in terms of revenues and customers PD Tax wanted to transfer their CRM and Client Projects from their current solution (based on their early choice of Capsule CRM) to a more scalable, cost effective and robust model that gave them flexibility and control. They wanted to backup their data to Sharepoint internally combined with an external cloud solution based on [FYI](#). Unfortunately, their customer contact, lead emails and project files were locked up in the current solution and proving difficult to extract and transfer. They needed someone who could securely extract their sensitive data from the current solution and transfer it to their internal SharePoint for subsequent upload to the new FYI based solution.



What options did PD Tax consider before choosing Maly?

“I explored a number of other avenues however I had concerns over data privacy and service levels with other providers, particularly the ones based overseas. I felt assured by Maly because of your integrity and professionalism, furthermore you were able to be very flexible and fit in with our moving timescales.”

Charlotte Wardle, Financial Manager at PD Tax

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The Solution:, Maly created a highly secure automated solution to extract the data from Capsule CRM and transfer it in the right format and to the right place in their SharePoint system for subsequent upload to the new CRM and Project tracking solution based on FYI. This saved PD Tax a significant amount of manual work and ensured the data was transferred efficiently and securely.

The Result: PD Tax now have all of their client and lead contact data as well as project information in the internal SharePoint and are no longer dependent on the external Capsule platform. They can transfer the data to FYI when they are ready and have a secure backup of all their important client and project data.

Benefits Summary

- ✓ Secure data extraction and migration
- ✓ Secure and reliable backup
- ✓ Automated workflow
- ✓ Scalable cloud adoption

How satisfied are you with Maly overall?

“Very satisfied, they kept us updated throughout and were able to work with us to ensure that their deliverable was what we needed. There were a number of moving parts in the project and they were flexible with a fluid approach.”



Did Maly meet your initial expectations?

“At the outset I expected there to be a number of issues just because it’s technology and software! I was impressed by their knowledge and expertise along with their ability to change deliverables to suit our needs. There were no issues at all. Really pleased, no stress whatsoever, would recommend!”

Charlotte Wardle, Financial Manager at PD Tax