



# Shorts' GENUS team saves over 120 hours a month with Fathom

**60 days**

Of accountants' time  
saved every year

**£300**

Increase in average monthly  
business advisory fees

## CASE STUDY



“Fathom has been excellent from the start. In the year we used it, we’ve had no issues—whereas problems were daily with our previous software.”



**Malcolm Pope,**  
Partner, and Head of GENUS, Shorts

Shorts is an award-winning accounting business based in Sheffield, UK. In its 130-year history, it has grown from a local business to a nationally recognised firm.

The company combines deep expertise with the latest technologies to find new ways to make its clients' businesses better and their personal finances stronger.

## HIGHLIGHTS

### CHALLENGES

- Wasting hours using inflexible and outdated reporting tool
- Feeling the frustration of manually uploading data
- Lacking confidence in the accuracy and reliability of existing software
- Struggling to meet tight deadlines due to extra layer of unnecessary pressure
- Missing opportunity to increase business advisory fees and boost revenue

### SOLUTION

Fathom provides an easy-to-use management reporting and financial analysis tool that:

- Transforms clients' source accounting data into unambiguous management information that drives actionable insights
- Seamlessly integrates with Xero, Quickbooks, MYOB and other packages
- Tracks financial and non-financial KPIs with ease
- Creates presentation-ready reports and dashboards

### RESULTS

- 120 hrs of accounting time saved each month
- £300 rise in average monthly business advisory fees—to around £1,200

## Challenges

### Complex, inflexible reporting tools put an extra layer of pressure on already stretched accounting team

For Shorts' GENUS management accountants team, its existing reporting and analysis tool just wasn't cutting it.

To outrun their competitors, they needed to be quick and agile in turning clients' accounting data into in-depth analysis and metrics. They also needed to deliver frequent and engaging management reporting services that helped firms understand their finances, spot potential issues, and unlock their hidden potential.

But there was one problem: their original software was hindering, not helping those goals. It was turning the job into a crawl—rather than the sprint they needed.

One of the platform's principal problems was its inability to reliably link to the company's accounting software, Xero. This meant the team was wasting a lot of time manually uploading data, including CSV files and fields from Excel.

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“Getting information into our platform was intensive,” said Malcolm Pope, Partner and Head of GENUS. “And there were all kinds of quirks and problems we were having every day that were eating up so much of our team's time.”

The original software's functions fell short in other areas too. Running management reports, analysis around customers' KPIs, and future forecasts was a complex job that required lots of training.

As well as draining resources, the software was affecting the team's morale. For a firm with a fantastic reputation, built over more than a century of great work, none of this sat well.

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“There was a lot of frustration here,” said Malcolm. “With most of our work, we have to meet tight deadlines to get it to the client or their bank by a certain date.

“When you're operating with such time pressures, you don't need something that's out of your control to make that even tighter. Not only did the previous software waste time, it added an extra layer of stress, which no one needed.”

Shorts needed a new reporting platform, and they needed it urgently. If they could find the functionality, performance and ease of use they needed, they could potentially save hours of time and put themselves in a great position to raise their business advisory fees—and their revenue.

**“Not only did the previous software waste time, it added an extra layer of stress, which no one needed.”**

# Solution

## An easy-to-use platform that turns clients' data into actionable insights and presentation-ready reports

Shorts discovered Fathom at Xerocon and loved what they saw. It makes generating management reporting and business analytics easy.

One of Fathom's Customer Success Specialists—a former accountant themselves—worked with Shorts from the get-go to familiarise them with the system, answer their questions and train the team.

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“Fathom were excellent from the start,” said Malcolm. “They completely understood what we were trying to do, which meant they could answer both our software questions and support our business objectives. We had training sessions and everyone could email them and would get quick answers. They were great.”

With the software rolled out, Shorts can:

- › Transform clients' source accounting data into intelligible management information that drives actionable insights
- › Seamlessly integrate with Xero, Quickbooks and MYOB—and upload data from other sources at the click of a button
- › Track clients' financial and non-financial KPIs, including profitability, cashflow and growth
- › Create presentation-ready reports and dashboards that look professional and are packed with easy-to-visualise data for their customers' banks or management teams

- › Whitelabel the reports with their own branding to drive new leads and sales
- › Help clients who are part of larger entities to benchmark their performance against others in the group
- › Get the support they need, without delay, with Fathom’s responsive Customer Success team

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“Fathom is probably the easiest piece of software we’ve ever introduced,” said Malcolm. “Its integration with our accounting software is so much more reliable than anything we’ve used before and we can do analysis, reporting and benchmarking at the click of a button.”

The team really appreciates just how easy it is to customise their reporting for different clients—giving them more detail and more value than ever before.

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“The great thing about Fathom is you can quickly make it bespoke for each client,” said Malcolm. “To give them the key information that they need is very quick and easy to do. The client will tell us they want analysis on X, Y, and Z. And we can do it within 10 minutes on Fathom.”

As Fathom becomes increasingly established in the business, Shorts benefit from the support of a dedicated account manager. With regular calls, the GENUS team have their questions quickly resolved, and stay abreast of any upcoming releases that might create even more possibilities and opportunities for their clients.

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## Results

**Five days of accounting time saved every month and bespoke management reporting made easy**

Shorts had been desperate to regain some of the time they’d been losing—and Fathom immediately delivered.

The GENUS team provides clients with monthly reporting packs to help them track performance. Thanks to Fathom, these are now created 1.5 hours faster than before. That’s a big deal, because across the firm’s 80 clients, they’re saving up to five days of accountants’ time every month.

Across every step of the reporting journey, time's being saved. And that's making it easier—and less stressful—for the GENUS team to meet their deadlines and satisfy clients. But punctuality isn't the only reason their clients are happier than ever.

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“Customers tell us that our customised reports are showing them more about their business than they've ever seen before,” said Malcolm. “They're seeing detailed forecasts, deeper insights into areas like profitability, activity and efficiency, and getting intelligent insights that help them identify areas of weakness and transform their performance.”

Fathom has also been driving new leads and sales for Shorts. Because they can whitelabel reports with their own branding, their name sticks—and referrals come naturally.

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“We're finding that bank managers and clients are so impressed with the clarity and professionalism of our reports that they're referring us to other businesses,” said Malcolm. “The great thing about word of mouth is there's already some trust to start with, which makes converting them that bit easier.”

Shorts are so confident in the quality of Fathom's reporting and analysis that they've raised their business advisory fees to around £1,200 a month, an increase of £300 from before.

Fathom continues to be the best option on the market for Shorts.

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“In the year we’ve used Fathom, we’ve not had a single issue — whereas problems were daily with our previous software,” said Malcolm.

“We feel like we’re only in second gear and there’s still a lot of untapped potential. We’re starting to move into the consolidated space and the benchmark space and we know we can start to build our plans around Fathom. We can easily scale in those areas quickly, because Fathom has so much functionality, is so user friendly and works so well.”

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**Want to save days of  
accounting time and generate  
more revenue from your clients?**

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businesses, so you can improve yours.

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