



How certification to ISO 9001 and ISO/IEC 27001 enables AdvanceTrack Outsourcing to demonstrate the quality and security of its services

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Vipul Sheth,
Managing Director, AdvanceTrack

Customer benefits

- Better quality and security management
- Alignment of quality and security with business objectives
- Improved service to customers
- Enhanced reputation and customer reassurance
- Stronger credentials in bids and tenders
- Significant competitive edge

At a glance

AdvanceTrack is a fast-growing professional services business, offering financial outsourcing services to accountancy practices and large firms. Since 2013, the company has held certification by BSI to two internationally recognized management system standards: ISO 9001 (Quality) and ISO/IEC 27001 (Information Security). In 2016, it completed a smooth transition to ISO 9001:2015. For AdvanceTrack, certification by BSI to both standards proves the quality and security of its offering to customers and prospects, providing it with a significant competitive advantage.

Customer background

AdvanceTrack (www.advancetrack.com) is a fast-growing provider of financial, accountancy, bookkeeping and taxation services. It is a leader in this specialist field, delivering outsourced solutions to accountancy practices and large businesses across the UK. With its headquarters at The University of Warwick Science Park and operational centres in India, the company is run by UK Chartered Accountants and Chartered Tax Advisers, and is a member firm of the Institute of Chartered Accountants in England and Wales (ICAEW).

AdvanceTrack is driven by its focus on technology and process, with the aim of delivering great service, value and security to customers. To support these goals, in 2013 it set out to achieve certification to the world's leading quality management standard, ISO 9001, and the internationally respected information security standard, ISO/IEC 27001. It has since transitioned to ISO/IEC 27001:2013 and the newly revised ISO 9001:2015, which offers strengthened relevance for technology-oriented service sector companies.

Why certification?

Certification forms a key part of the company's ongoing strategy to develop and grow. As Managing Director Vipul Sheth explains, "The two things businesses worry about most are the quality of the service they receive and the security of their confidential client data. But the outsourcing industry doesn't enjoy a good reputation. Our client retention has always been good, but to explain to a sceptical audience that you are an exception is much harder without credible external verification."

Sheth continues, "We come across businesses that have experienced poor quality and service, which creates a major difficulty in engaging with them. And as most potential buyers of our services don't have an IT background, they don't fully understand what is secure or insecure."

A conversation with a partner of a major accountancy firm highlighted the data security problem. "His perception was that another provider had better security credentials than us, pointing to its ISO/IEC 27001 certification. But that provider used an unknown certification body, and when we reviewed its processes, we found its data transfer site wasn't secure at all."

Sheth concluded that, "rather than bleat about other providers, we would prove our own

quality and security by using a robust global certification body, BSI, to audit our processes and then ask customers to consider the true value of our certification compared with others."

Implementation and transition

AdvanceTrack already had sophisticated management systems that allowed quality measurement and secure interface between its customers and processing teams. "We were searching for improvements to already strong processes," says Sheth. "But we didn't expect the process to be easy, as we knew BSI's audit process would be robust."

The two standards were first implemented simultaneously over a nine-month period in 2013. The company allocated resources to ensure all its systems, methods and processes met the requirements of both standards and that staff had the correct training. All staff across all levels were involved at various stages, while IT managers, product delivery managers, ISO managers and senior management all provided input into ensuring more effective, efficient and secure ways of working.

"The biggest challenge was embedding the management of client processes into our own processes," says Sheth. "This also required buy-in from customers, which we achieved through conversations with them, encouraging them to provide input that enabled the two-way process to be dynamic, but businesslike."

In 2014, AdvanceTrack transitioned smoothly to ISO/IEC 27001:2013 and, in 2016, came the transition to ISO 9001:2015. In particular, the company welcomed the progressive nature of the revised ISO 9001 standard, with its emphasis on leadership, and its alignment of quality systems with strategic objectives, supporting AdvanceTrack's own philosophy of making customer service a priority.

BSI's role

AdvanceTrack chose BSI as its certification provider because BSI is known worldwide as a robust certification body with a strong audit process. "I knew BSI for many years from my own experience as a consumer and as a financial auditor," says Sheth. "BSI's industry knowledge, technical expertise and client support were deciding factors for our business."

BSI worked closely with AdvanceTrack during both its initial dual certification process, then transition to ISO/IEC 27001:2013 and its recent

transition to ISO 9001:2015, adding value in each case. "We shared our ambitions with BSI, which provided extra information that was prepared specifically for us," says Sheth. "Our audit managers from BSI have been exceptional over the past few years and have really supported us in improving our processes."

Benefits

For AdvanceTrack, the benefits of certification are embedded in the quality and security-driven environment in which the company operates. "We have always understood quality and security, but the two standards have helped create a management system that improves our processes by having a systematic approach," says Sheth.

He says certification has delivered "significant value" to the company. "Our certification to ISO 9001 and ISO/IEC 27001 certainly makes market access to firms of a certain size much easier, as they are instantly clear that our processes have attained a robust standard."

Being able to point to two international standards audited by BSI also shortens the buying cycle by cutting down the information AdvanceTrack needs to provide to potential customers. "They no longer need to ask many questions about our quality and security processes because we can provide an independent third party assessment of our processes, which is what stakeholders value."

Sheth concludes, "By demonstrating our quality and security through certification to international standards, we set ourselves apart from companies that do not undertake external review. Clearly, being assessed by a global leader in BSI adds greater gravitas to our certification.

"It gives us globally recognized credibility as we expand our business in the UK and overseas to customers who may have little knowledge of our company, giving them greater confidence in doing business with us."

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