Dedicated Entity Management Software vs. Outsourcing

Which actually makes your life easier?

Konsise

In this guide

If you have ever sent a “gentle follow-up” email to a secretarial firm for the third time this week, this one is for you.

You know the drill. You request a simple director change. It is sent to a shared inbox somewhere. A ticket appears. A mysterious person picks it up. Then you get a reply, a PDF, and a surprise line on your next invoice. All for something you could have done during your morning coffee if you had the tools.

The core question is simple. Should a company secretary keep outsourcing everything to a secretarial firm, or move to a dedicated entity management solution and bring the engine in-house?

This guide compares the two approaches on cost, control, speed, risk, data quality, and long-term value. Outsourced partners still have their place, especially for complex or one-off work, but your day-to-day reality can look very different depending on which route you choose.

Let us walk through what that difference actually feels like in practice.

Entity Management Platforms

What they really cover for company secretaries

For company secretaries and other compliance professionals, entity management is the structured oversight of a company's legal entities to ensure they remain compliant, transparent, and properly governed.

It goes far beyond just filing annual returns. It's about controlling the entire corporate record lifecycle across subsidiaries, branches, and related entities.

Here's what it typically covers:

- CIPC filings and updates
- Beneficial ownership (BO) registers and reports
- Director appointments and resignations
- Resolutions and meeting records
- Annual returns and associated deadlines
- Group structure charts and ownership maps
- Records needed by auditors and tax
- Board and committee reporting on entity status

Both outsourcing and an internal platform can cover these tasks. The difference lies in where the work is located and how much you can see.

In a pure outsourced model, you send instructions, documents, and approvals to your auditors or secretarial firm. They prepare forms, push filings, keep registers, and send you PDFs, registers, and invoices. Your "system" is a mix of email threads, shared folders, and maybe a spreadsheet that tries its best to keep up.

With a dedicated entity management platform, you and your team work inside a single, central system. You see all your entities, deadlines, BO records, and filings in one place. You can trigger updates directly, keep digital registers, and track who did what and when.

The responsibilities may appear identical on paper; however, the day-to-day execution and operational realities differ significantly.

Typical outsourced company secretarial model in South Africa

Most South African secretarial firms follow a similar pattern.

As a client, you would usually see:

- Time-based billing or per-task fees
- Email requests, sometimes sent to a general "corpsec" address
- Shared inboxes and ticket queues
- PDF outputs, registers, and resolutions sent back for you to file

It works well for a small portfolio or an occasional change. The strain starts when you manage tens or hundreds of entities with frequent CIPC or BO updates.

Common friction points appear:

- Slow replies when that shared inbox is overflowing
- Unclear status, because your only "dashboard" is your sent items
- Extra fees for each BO update, director change, or extra draft
- Different formats and document naming from job to job

None of this is malicious. Outsourced firms juggle many clients, all shouting "urgent". Your request joins the queue like everyone else's.

The problem is that your regulators, auditors, and board do not care that your request is "in progress". They just want answers and clean records, right now, please.

What a dedicated entity management solution looks like day to day

Now, picture this. You log into a cloud-based, central platform used by your internal team. One screen shows:

- Every entity in the group
- Status of annual returns
- Upcoming CIPC and BO deadlines
- Director changes
- Key documents and resolutions per entity

You work from a single source of truth for each entity, not multiple versions spread across email and Excel. Digital registers are located within the entity profile. Automated reminders flag what is due this month, and all approvals and documents are stored in the same system.

A company secretary compliance platform does not replace you. It turns you into the conductor of the orchestra rather than the person chasing every musician for their sheet music.

When a director asks, "Are we up to date with CIPC on that new subsidiary?", you do not send an email to your outsourced firm and wait. You open the entity and answer in seconds

Cost Efficiency

Predictable pricing vs growing
outsourcing bills

Let’s talk about the money, because finance always will.

Outsourcing usually means:

- Hourly billing for consulting time
- Per filing fees for CIPC work
- Extra charges for BO updates, resolutions, and “special” work

On day one, that looks flexible. You pay only for what you use. Over the course of a year, especially with frequent changes, that “flexibility” often turns into a long list of line items on an invoice that’s hard to defend.

Now, compare that with a dedicated entity management solution. A typical platform operates on a fixed subscription model. Pricing is based on bands or entity volumes, not on how many directors you update this quarter. You pay one fee, then use it as much as you need.

The impact on your budget is simple:

- The bill does not explode when you restructure or clean up BO data
- You can budget without guesswork
- Each entity costs less in real time because your team works inside the single system

You also pull more work in-house. Instead of sending five simple director changes to a firm, your team updates the platform directly. Outsourced partners can focus on complex transactions, rather than every minor update.

Finance likes this. You get cost control. They get fewer surprises.

Why per-task and hourly fees add up faster than you think

Let us run a simple example.

You have ten legal entities, and during a year, you do:

- Three BO changes per entity
- Two director changes per entity

That is 30 BO updates and 20 director changes.

If your secretarial firm bills each of those as a separate task, you now have 50 fee lines and that excludes any extras such as;

- Draft resolutions
- Extra CIPC forms
- Corrections when CIPC bounces something back

Your neat budget line, “Secretarial fees”, starts to look like a restaurant bill after a long night with friends. Lots of small items that no one remembers ordering.

There is also hidden time cost:

- Briefing the firm on each change
- Digging for documents they request
- Chasing updates on status
- Checking PDFs and registers they send back

You may not see those hours on an invoice, but they come out of your day. And somehow, the biggest invoice tends to arrive just after financial year end. Always a nice surprise when you are already explaining audit adjustments.

How a fixed fee entity management platform protects your budget

A dedicated platform flips that logic. You pay a fixed subscription. It may scale with the number of entities, users, or features. It does not change each time you add or edit a record. This helps you:

- Lock in clear annual cost
- Report a sensible “cost per entity” to leadership
- Avoid long, painful chats with finance about extra invoices

Once the system is in place, each extra entity is cheaper in real terms. You have already paid for the platform. Your team clicks through pre-set workflows, uses templates, and sends updates faster. Over time, those gains add up far more than shaving a small discount off an hourly rate.

Control, Speed & Compliance

Why in-house beats the queue

Freeing up time to focus on higher-value tasks

Many company secretaries outsource routine secretarial tasks to focus on governance, board support, and strategic matters. That intention makes sense. Your time is valuable.

However, even in a fully outsourced model, accountability for compliance remains internal. You still review drafts, approve filings, answer internal queries, and provide updates to the board and executive team. The responsibility does not move; only the execution does.

For some teams, outsourcing works well, especially where internal capacity is limited. For others, the coordination involved, briefing, follow-ups, checking registers, and reconciling updates begins to take up more time than expected.

A dedicated entity management platform does not mean “doing everything yourself.” It means centralising visibility and control so routine changes can move faster, with fewer handoffs and less back-and-forth. The question is less about who captures the data and more about where control, speed, and reporting sit. When day-to-day updates live in a structured internal system, many company secretaries find they spend less time coordinating tasks and more time using accurate information to support governance decisions.

Cost matters, but your sanity matters more.

The real win of a dedicated solution sits in three areas that are tightly linked:

- Control over your data and filings
- Speed when someone needs an answer now
- Lower compliance risk across the group

Picture a normal week in your role: an auditor wants proof of a director's appointment from 2 years ago, a regulator asks for BO information on short notice, the board pack needs updating by Friday, and a new entity must be registered ahead of a key contract. Outsourcing puts you at the mercy of someone else’s workload. You ask, they queue, you wait. A dedicated platform changes you from “traffic controller for email” to “owner of the engine room”.

Lower compliance risk with automated reminders and audit trails

Email and spreadsheets are sneaky risk engines. Things go wrong when:

- A key deadline sits in someone’s personal inbox
- A reminder gets lost in a long email chain
- A register update is captured in one place, but not in another
- No one can show who approved a change or when they did it

Dashboards are not just pretty charts

They are your quick answer machine. In a good system, you can see:

- Which entities are in good standing
- Upcoming annual returns and filing dates
- Pending director or officer changes
- BO updates that still need to be pushed to CIPC
- Which tasks sit with which user

When you outsource, you often do not have this view and need to search your inbox, check spreadsheets that may or may not be current or Email or call the firm and wait for an update.

With a central platform, you get answers in seconds. Urgency is where outsourced queues really hurt. Think about that "must be filed today" moment:

- A last minute director appointment
- A regulator requesting corrected BO data
- An auditor chasing proof that a filing went through on a certain date

If you depend on a secretarial firm, your urgent job lands in a queue with other urgent jobs. They do their best, but they still have clocks and humans.

With your own platform, you prepare the filing inside the system, pull the data directly from the entity record and act right away, rather than waiting for a slot in someone else's schedule

You can set clear internal SLAs like "same day drafting" or "48-hour turnaround" and actually hit them. Late filing penalties drop. So does that awful feeling when someone from compliance calls to ask, "Did we submit this on time?"

How does a central system change that?

With a centralised system, when an auditor asks, "Who approved this change and when?", you do not dig through Outlook for 30 minutes. You open the entity, check the log, and show them. You get:

- Automated reminders for annual returns, BO updates, and key events
- Task lists that show what is due and who owns it
- Full audit trails of who changed what, when, and why
- Digital registers that update from the same source data

Data Integrity & Scalability

Building a single source of truth

Good compliance rests on boring things

A dedicated entity management solution gives you both clean data and repeatable processes. Instead of CIPC data in one place, BO records in another, internal registers in a third and PDFs stored wherever someone felt like saving them that day. You get a single source of truth for each entity. Every filing, BO record, register, and document links back to that core record.

This pays off twice. Data quality improves because you stop retyping the same fields across multiple documents, and you can grow the portfolio without multiplying manual work and outsourcing fees.

From scattered emails to a single, reliable entity record

As your group adds entities, restructures, or acquires companies, a centralised system keeps structure while the world around it gets messy. From scattered emails to a single, reliable entity record. Right now, your records probably live in:

- Excel sheets on a shared drive, with names like "Entities_FINAL_v7"
- Email threads from your secretarial firm with attached PDFs
- Folders for each entity, all different, all incomplete in some way
- Internal reports built by copying and pasting data from three files

It works until someone leaves, a drive is cleaned up, or you need to prove history to an auditor. The alternative is one digital file per entity within your platform that serves as an accurate data repository for:

- Core master data
- Directors and officers
- BO records and structure charts
- Registers and resolutions
- Filings and approvals, which are all time-stamped

You stop capturing the same information three times. The number of errors and discrepancies fall.

Scaling your entity portfolio without scaling your outsourcing bills

Growth is fun for the business. Less fun when you are the one trying to keep the entity register tidy. As your group:

- Adds new subsidiaries
- Restructures ownership
- Acquires companies in different sectors

The pressure on both your secretarial firm and your internal team rises. Without a platform, each new entity means:

- More emails
- More manual tracking
- Higher outsourced cost

With a central system, one small team can handle more entities because:

- Workflows are repeatable
- Reminders are automated
- Data capture is standard across the portfolio

Your outsourcing bill does not need to grow in step with your entity count. You keep margins and control inside the organisation. If you are coming off older tools, this is the opportunity to turn company secretaries into strategic partners, not paper chasers

This is the fun part.

When the routine admin sits inside a dedicated solution, the company secretarial team stops living in spreadsheets and inboxes. Time opens up for:

- Stronger board and committee support
- Better governance frameworks and policies
- Deeper risk oversight on structures and ownership
- Planning for regulatory changes before they hit

You move from "person begging for signed resolutions" to "trusted adviser on governance and structure".

In plain terms: less spreadsheet wrestling, more seat at the table.

Implementation Support

Removing the burden from internal teams

From system setup to operational use, without internal disruption

A common concern is whether adopting a new platform simply becomes another project added to an already full workload.

In practice, it shouldn't.

Most implementations are handled by a dedicated project team that handles the heavy lifting. Not to send you a login and a PDF manual, but to structure the system properly before you are expected to rely on it.

That typically means:

- Structuring your entity register correctly from the outset
- Loading directors, officers, and beneficial ownership data
- Uploading historical documents and statutory registers
- Configuring workflows, approvals, and reminders
- Training users on the day-to-day practicalities

If needed, detailed share history and legacy records can also be loaded. You start with a complete and reliable dataset rather than rebuilding your history over time.

From implementation burden to managed transition

The objective is not to hand over a tool and hope your team "finds the time" to implement it. It is to transition responsibility for setup, data structure, and training away from your internal team.

Instead of running a parallel change programme, your team focuses on using the platform.

For most organisations, implementation becomes a managed transition rather than an internal project. The work happens. The data is structured properly. The system is configured correctly.

And your team can get on with governance, not system administration.

Conclusion

Build your engine in-house,
use firms for the special projects

Outsourced secretarial support still has a place. Complex restructures, tricky opinions, and unusual transactions often need external skill. But making your whole compliance engine depend on email chains and hourly rates holds you back.

A dedicated entity management solution brings:

- Cost predictability, instead of exploding per task fees
- Full visibility of filings, deadlines, and BO data
- Faster action when auditors, regulators, or directors need answers
- Lower compliance risk with reminders and audit trails
- Better data integrity from a single source of truth
- The ability to scale your portfolio without scaling your outsourcing bill
- Smarter use of the company secretary's time as a strategic partner

The sweet spot for many teams is a blended model. Use a platform like Konsise, which offers centralised company secretary compliance as your day-to-day engine, and bring in an external secretarial firm for complex or one-off matters.

So the real question is simple:
Do you want to keep chasing emails or log into a single, clean dashboard?

Comparative Table: Dedicated Entity Management Solution vs Outsourcing

	Dedicated Entity Management Solution	Outsourced to Auditors or Secretarial Firm
Cost structure	Fixed annual subscription, predictable spend, cost per entity, easy to report.	Hourly billing + per task fees. Costs increase with each filing, change, update or correction
Speed	Immediate action. Internal team triggers filings directly	Delays due to shared inboxes, ticket queues, firm capacity and follow-ups
Compliance & visibility	Full dashboard visibility across entities, deadlines, BO records, filing	Limited visibiluty. Status lives in emails, attachments and spreadsheets
Compliance risk	Reduced risk through automated reminders, audit trails, consistent digital registers	Higher risk due to missed emails, misaligned registers, omconsistent document storage
Data integrity	Single source of true. Structured data. Standarised reports	Data scattered across emails, PDFs, spreadsheets, inconsistent naming
Scalability	Easily scales. Same team managed large portfolios via workflows and automation	Costs and work load increase linearly as entity numbers grow
Turnaround on urgent tasks	Same day drafting and filing possible. No external ques	Urgent work enters a queue
Internal efficiency	Admin load drops. Frees capavity for govevernane, board structure and strategic work	Heavy internal time spent briefing, chasing, filing and reconciling
Use case	Daily entity admin, frequent changes, BO updates, group reporting, audit rediness	Complex transactions, restructures, unusual filings, specialist opinions

About Konsise

Konsise (pronounced "concise") is a cutting-edge tax compliance and secretarial software platform developed for South African businesses, accounting firms, and tax practitioners. Our name reflects our mission, simplification and organisation, a blend of the words "consistent" and "precise." We believe that maintaining a structured, accurate approach to tax and entity management enables professionals to reduce risk, save time, and focus on high-value strategic growth opportunities.

Konsise offers a comprehensive suite of tools that automate tax workflows, centralise critical tax data, and integrate seamlessly with SARS eFiling, covering obligations for various tax types. The platform also includes powerful Entity Management functionality, allowing users to maintain an accurate, up-to-date register of all legal entities, company documents, compliance deadlines, and director information in one secure location. This centralised view supports better governance, improved accountability, and streamlined audits.

With an intuitive interface, robust enterprise-grade security, and automatic backups, Konsise empowers tax and secretarial teams to stay ahead of deadlines, reduce manual errors, and operate with confidence and control.

Konsise