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WORKFLOW.

Berdon: Success with a summer software strategy.

"Implementing XCM is the easy part. The hard part is getting people comfortable changing the way they work." – Harvey Susnick, Partner, Berdon LLP

Project Goal: Streamlining Tax

In April of 2013, Berdon initiated a project with a goal of standardizing the firm's entire tax practice on a single workflow solution. In essence, Berdon sought to streamline tax preparation to improve efficiency and use less paper. This effort was no small undertaking in a firm that prepares more than 10,000 tax returns annually.

The firm had been using a customized Microsoft® Access® database system it called Tax Tracker for due date management and tax jackets for work routing, and was very dependent on paper, which hindered timely updates to the database. The biggest challenge the firm faced with this system was in knowing where the work was at any given point in time.

"We had started evaluating technologies to help us create a more efficient, digital tax process – essentially, to reduce our reliance on paper," said Dennis McGuckian, manager of Tax Administration at Berdon. "After learning more about XCM, we realized that what we actually needed was a workflow system. We already had a document management system – we just needed a practical solution that would empower us to work digitally."

Product Selection and Implementation

During the spring, Berdon evaluated options from two leading workflow vendors. The firm has always followed a more pragmatic approach to technology adoption – choosing best-of-breed products over single vendor suites. At the time of the workflow project, the firm had already been using Autonomy WorkSite for document management for nearly a decade, and had also been using Thomson Reuter's GoSystem Tax RS software and Aderant Expert practice management software.

By June, it had selected the XCM workflow automation software and scheduling module.

"In a perfect world, it would be great to have a fully integrated suite with all the best offerings from the same vendor, but practically you would have to be starting from scratch with everything for that to be a viable option," said Harvey Susnick, partner at Berdon. "We're closing in on a million documents in our DMS system, so we're not likely to switch. And, realistically, such a system doesn't exist," he added.

The implementation and training of the XCM software took just three weeks, an aggressive but achievable goal for a firm committed to a tight rollout timeline during the slower summer months. In August, Berdon opted to import all of its remaining extension work only, with a plan to import all of its tax work later in the fall.

In fact, this timeline also helped Berdon ease the transition. A July implementation allowed the firm to take advantage of the second tax season to have a soft opening. For the fall deadlines, they had run the new system in parallel to the previous system of tax jackets, which had already been created, and the Tax Tracker program. By January, Berdon's processes had been further refined and there was only one system for managing due dates and workflow.

Building on Positive Results

The results of Berdon's "less paper" initiatives were immediately clear. It had reduced the reams of paper purchased January through April by 31 percent.

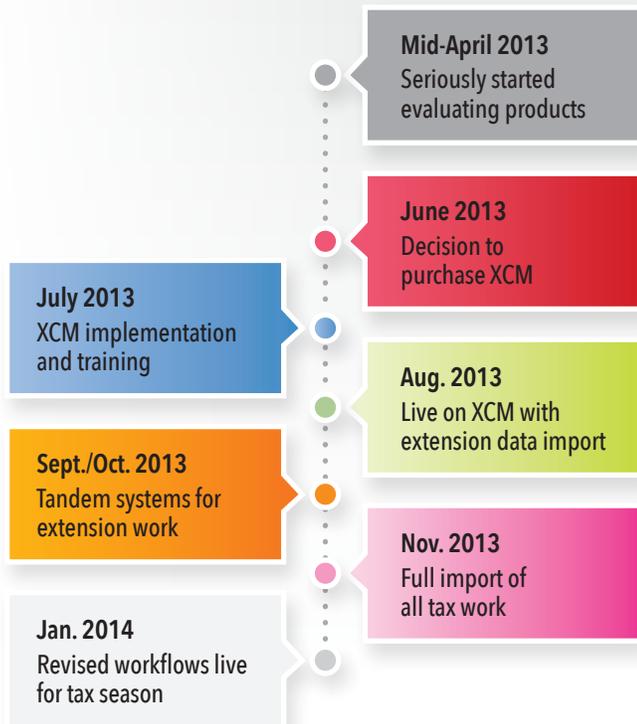
More than that, XCM has afforded the firm greater visibility – another chief goal of this technology project. In the past, time was wasted tracking down missing tax jackets – sending out emails, investigating who touched it in the tax software, checking the clipboard to see to whom it was originally assigned and what may have happened to it since.

"Now we can track where things are in real-time," Susnick said. "You can see who touched it and the path the work took. It's also made it a lot easier for tax control. They can see if something's been sitting idle for ten days and who to follow up with. XCM saves a significant amount of time by giving us a view into where all the work is at any given point in time."

Susnick added, "The real value isn't in measuring how much time we save on each project, though there's no doubt that's real. For me, it's in the peace of mind in knowing where things stand and not having to worry about looking for them."

For Berdon, process refinement is an ongoing project, as the tax practice finds that it's constantly making adjustments – even if minor – to its workflow. The Visio® file the firm used to map this workflow originally is now in its 14th revision. The firm's goal for summer 2016 is to utilize XCM for management of the financial statement issuance process, for which it has started to build out statuses.

Figure 1. XCM Implementation Timeline



“Not only did XCM appear to be more intuitive and easy to use, but it was also a good fit with our existing technologies. As a firm, we use our collective expertise to provide our clients with the best solution for a specific need. That same principle has guided our technology adoption – selecting the best product for a particular function.”

– Harvey Susnick
Partner, Berdon

About XCM

XCM is the only mature, firm-wide workflow solution that can deliver a complete view of all your client work across all offices and in all departments.

XCM Solutions is the leading provider of productivity enablement solutions for the accounting profession. The XCM suite of flexible, cloud-based workflow automation, resource management, and collaboration solutions are used by more than 25,000 professionals.

Learn how XCM can help you significantly improve productivity, visibility, and control over your daily work processes.

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LISTEN. SOLVE. DO. >™

STATS AT A GLANCE

Firm Profile

Founded in 1917, Berdon LLP, is one of the nation's top CPA and advisory firms. Berdon delivers a comprehensive array of accounting, tax, financial and management advisory services to businesses at any stage in development. Berdon serves individuals, privately held organizations and multinational corporations operating in virtually every business sector, industry and profession.

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