

withum⁺ experience

CASE STUDY



HEADQUARTERS
United States
Northeast



SIZE
Top 25 National
Accounting Firm
2,000+ employees



AUTOMATION LEVEL
Advanced



SPECIALTIES
Advisory,
Assurance & Tax

Withum Experience, Powered By Avii Improves Client Satisfaction and Firm Efficiency By Interconnecting More Systems and Leveraging Live Data



Avii Impact

- > Interconnects more of Withum's data and 3rd-party applications
- > Fuels team adoption of streamlined automations over manual processes
- > Improves communications between teams and clients
- > Significantly unifies and simplifies user experiences for practitioners and clients

Before Avii

Withum is a longstanding advisory, assurance, and tax firm ranking in the U.S. Top 25. They embody a forward-thinking and tech-driving culture, emphasizing "better workspace automation for better client experiences" and maximizing the power of their data.

In 2017, Withum created an internal Innovation Council to carry out technology-driven initiatives that propel the firm forward. To address their challenges, the firm tasked the Council with using their top-tier internal research, analytical, and technology resources to discover, test and deploy ideal automation technologies available for their accounting professionals and clients. From those efforts, Avii was selected as the software engine to power a significant evolution of the firm's processes and interactions with their clients, which they call "The Withum Experience."



"Withum is a long-time customer of Avii. Withum relies on the client portal and automations from Avii to fuel consistency and productivity. Our collaboration with Avii shows what is possible when modern software vendors put firms first."

MATTHEW WALSH, CPA & PARTNER AT WITHUM

Since then, Avii has worked with this group on a monthly basis to drive continual change management at the firm.

Main Challenges

- > They desired to improve the process and capabilities of engaging with clients
- > Many task lists were being managed manually
- > Employees were manually requesting and delivering reports
- > Communication with clients needed absolute security
- > Legacy software systems were designed to not interconnect with other software, which prevented cross-system automations, unified dashboards, and consolidated data-driven business intelligence

After Avii

The Withum Experience Powered By Avii was deployed to provide their team members and clients with access to a significantly improved and automated engagement workspace and client portal. It also helps Withum establish automated processes, streamline data connectivity, and become more efficient by fueling adherence to the firm's best practices.



Avii Workspace™ Includes:

- > **Avii API Connectivity:** Avii interconnects and unifies data from Avii, 3rd-party apps, data warehouses, and more, automating the collection of data to eliminate reliance on humans and static reports. Avii does not charge extra for APIs or data warehouse usage.
- > **Live Automations:** Withum is utilizing dashboards, like Avii Project Queue, for real-time info. Project Queue is a robust project management tool that provides team members with one place to advance their projects and stay up-to-date on what has been completed and what is next. It spans their own workspace as well as those of their clients and all team members on their engagements across teams which utilize this tool.
- > **Increased Clarity:** Avii integrates in-context discussions with document request lists to increase clarity while maintaining security.
- > **Box® Integration and Bi-directional Syncing:** When a client uploads documents, whether through Box or the Avii Client Portal, the permissions, rules, and best practices will inherit the native Box settings.
- > **Outlook Calendar:** Adds the ability to update and review calendar items through Avii Workspace.
- > **Streamlined Communication:** Client and team members easily discuss documents, tasks, and other questions within the Avii Workspace™. The discussions occur within a centralized location, making it easy to keep track of conversations around sensitive information.

The partnership between Withum and Avii resulted in both practitioners and clients enjoying connected experiences within a unified workspace. They also gained increased transparency, dynamic automations, real-time status dashboards, and big data insights.

"By implementing intelligent automations in place of cumbersome manual processes, Avii has not only improved our client relationships, but also saved us time and helped us operate with greater transparency on client projects."



MATTHEW WALSH, CPA & PARTNER AT WITHUM



Avii Solutions

- > Avii Workspace™
- > Client Portal
- > API Connectivity
- > Avii Data Warehouse
- > Dynamic Automations
- > Project Queue
- > Projects, Tasks, and Workflows
- > Document Exchange with Box® integration
- > Integrated Communication
- > Live Dashboards

Getting Started

The Withum Experience Powered By Avii is one of the most significant outcomes of Withum's Innovation Council. Their Innovation Council was integral in uncovering their firm's needs, defining how accounting automation and communications could help, and selecting Avii Workspace as the accounting platform to unite their processes, data, teams, and their clients.

Withum is currently expanding automations to additional teams. Avii's architecture and flexibility allow for technology and process management staff to land and expand across the firm. Working in Avii Workspace is spreading knowledge of and compliance with Withum's best practices. It's creating more efficiency - team by team - and more consistency between clients and practitioners.

About Withum Smith + Brown, PC

Location: Princeton, New Jersey

Website: withum.com

Founded in 1974, one of Avii's earliest customers is an award-winning Top 25 public accounting and advisory firm in the U.S. with offices in major financial centers including New York City, Boston, Philadelphia, Baltimore, Washington DC, Orlando, and San Francisco. As a client-focused organization, Withum is leading the accounting industry by providing its highly responsive team of professionals with ever-increasing levels of value-add analysis, business intelligence, and guidance to support the growing number of consumers and businesses who depend on them in today's increasingly complex business landscape.

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