



HEADQUARTERS
Atlanta, GA



SIZE
Global



AUTOMATION LEVEL
Advanced



SPECIALTIES
Award-Winning Top-Rated
CPA and Advisory Services



Avii Impact

- > Shortened Response Times
- > Improved Collaboration Between Clients and Team
- > Increased Productivity
- > More Unified UX for Clients
- > Interconnected Applications and Data

As of December 2020, Aprio LLP's engagement teams began powering their interactions and dynamic workflows with Avii, a unified practice management platform focused on delivering exceptional experiences for clients, practitioners and managers.

Avii's strength in using technology to drive Change Management and Accounting Experience Management™ coupled with Avii's cohesive platform that interacts with 3rd party apps allowed Aprio to make significant improvements to existing processes and applications.

In addition, Avii's workflow automation drives significant efficiencies and increased productivity during client engagements. In all, Aprio is using Avii in the Tax, Audit, Assurance, Benefits Administration and Wealth Management service teams of the company. Almost all Aprio teams / team members rely on Avii Workspace to improve their daily work activities and their interactions with clients.

Before Avii

As with most accounting firms large and small, Aprio's teams have relied on many disparate software tools to meet their goal of providing up-to-the-minute and forward-looking support for clients throughout the U.S. and in 50 countries. To maintain its leadership role, Aprio has been increasingly interested in solutions that can support an evolving focus on effective Change Management and Accounting Experience Management as a means of streamlining and integrating its functions with a higher degree of integration and seamless automation and less reliance on traditional tools.

Main Challenges

- > Some task lists were still being managed manually
- > Reduce and consolidate software stack
- > Increase automation
- > Unify and enhance workflow management
- > Improve access to data

Other Challenges

As a high-growth organization of more than 750 employees and revenues in the hundreds of millions, Aprio requires the utmost in forward-thinking and dynamic solutions from its software technology providers. Yet the size and geographic scope of the firm makes change management a continual challenge that needs to be handled with high foresight and a high degree of correlation and process. For Aprio, change management is integral to its very operation. Aprio understands a perpetual process as opposed to a simultaneous and system wide shift and fully

Before Avii Continued

exemplifies the fact that Change Management is more than what you do. It's how you do it and how it's perceived, experienced, and measured by clients, practitioners and managers.

Summary

Aprio and Avii are driving Change Management, successfully displacing multiple traditional software tools, and introducing greater efficiency, continuity and effectiveness to the company's Tax, Audit, Assurance, Benefits Administration and Wealth Management teams in multiple regions.

After Avii

For Aprio and Avii, superb communication on both sides has allowed Aprio's move to Avii's automation to progress smoothly. Likewise, by its very architecture, the tools in Avii Workspace guide firms through the steps that allow their progressive steps in software automation to be as effective as possible and to spread as quickly and well as possible for the benefit of all Aprio employees and teams.



Avii Solutions

- > API Connectivity
- > Automated Workflows
- > Secure Document Exchange with Box® Integration
- > Client Portal
- > Project Management
- > Tasks Management
- > Project Deliverables



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“Aprio is leveraging technology to elevate our industry-leading standards of excellence. We reviewed top software providers and Avii surfaced as the leader.

Many of our teams are now collaborating on the Avii Workspace Platform and are experiencing more secure and satisfying client interactions powered by data-driven insights and live dashboards.”

DAN MALLORY, CIO OF APRIO

About Aprio

Location: Atlanta, Georgia

Website: aprio.com

Aprio is a premier CPA and business advisory firm that advises clients and associates on how to achieve what's next. Aprio's associates work as integrated teams across advisory, assurance, tax, outsourcing, staffing, and private client services, bringing the best thinking and personal commitment to each client. Across practices, Aprio brings together proven expertise, deep understanding, and strategic foresight for industries including Manufacturing and Distribution; Non-Profit and Education; Professional Services; Real Estate and Construction; Retail, Franchise and Hospitality; and Technology & Blockchain.

Headquartered in Atlanta, Georgia, Aprio has grown to over 750+ team members. To serve clients wherever life or business may take them, Aprio's teams speak more than 30 languages and work with clients in over 50 countries.