



HEADQUARTERS
St. Louis, MO



SIZE
National



AUTOMATION LEVEL
Q4 2022 Leveraged
Pre-Defined
Automations | Q2 2023 Initiated
Customized
Automations



SPECIALTIES
Award-Winning
Top-Rated CPA and
Advisory Services

Anders CPAs + Advisors Accelerates Firm Automation with Avii Workspace



Expected Avii Impact ONCE FULLY IMPLEMENTED

- > Unified UX Across More Workspace Actions for Clients & Staff
- > Automations and Templates Drive:
 - Client Engagement, Workflows & Reminders
 - Document Management
 - Project & Task Management
- > Improved Collaboration Between Clients and Team
- > Extensive Live Status KPIs & Visual Dashboards
- > Shortened Response Times
- > Increased Productivity
- > Unified Communication
- > Interconnected 3rd-Party Apps and Data Through Avii SaaS Hub:
 - Bi-directional connectivity between Avii and MS SharePoint
 - Access to all Avii data points via Avii Data Warehouse
 - Direct API calls to/from Avii

Introduction

As of September 2022, Anders client engagement teams began automating and powering communications, interactions, document management, and workflows with Avii, a unified practice management platform focused on delivering exceptional experiences for clients, practitioners, and managers. The firm has adopted Avii as one of their primary platforms for engagement with a growing subset of clients.

Avii's strength in using technology to drive Change Management and Accounting Experience Management™, coupled with Avii's automation platform that interacts with 3rd party apps, will enable Anders to start making significant improvements to existing processes, interactions, applications, and outcomes.

In addition, Avii's workflow automations are helping to drive significant efficiencies and increased productivity during client engagements. Anders Client Engagement Specialists (CES) utilize Avii to deliver an enhanced client experience through streamlined communication and document requests.

Before Avii

As with most accounting firms, large and small, Anders teams relied on dozens of disparate software tools to meet their goal of providing up-to-the-minute and forward-looking support for clients throughout the U.S. Anders is interested in solutions that support an evolving focus on effective change management and technology evolution as a means of streamlining and integrating its functions with a higher degree of seamless automations, an expanding live data warehouse, and less reliance on traditional tools.

Main Challenges

- > Client and Project Setup were labor-heavy
- > Many task lists were managed manually
- > Software stack needed to be reduced and interconnected
- > Automations were limited
- > Workflow management was disconnected and labor-heavy
- > Access to Live Data to drive more of the business was limited



Before Avii Continued

Other Challenges

As a high-growth organization of more than 400 employees and revenues in the tens of millions, Anders requires innovative, forward-thinking and dynamic solutions from its software technology providers. Yet the size of the firm and nature of historic accounting software make Change Management a continual challenge that needs to be handled with high foresight and a high degree of correlation and process. For Anders, Change Management is integral to its very operation. The firm understands a perpetual process as opposed to a simultaneous and system-wide shift and fully 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. Anders continues to evaluate how technology can provide efficiencies and opportunities to automate so their advisors can focus on better serving their clients.

After Avii

For Anders and Avii, communication on both sides allowed the firm's move to Avii's automation to progress in an effective manner. Likewise, by its very architecture, the tools in Avii Workspace guide the firm through the steps that allow their progressive expansion in software automations to spread as effectively as possible, benefiting Anders clients and employees.

Anders was able to implement many components of the Avii platform, and transition a subset of clients, projects, functions, and data within a few weeks of realistic collaborative effort with Avii. Anders and Avii continued working together throughout Busy Season 2023 and again this past summer to expand automations and interconnect more functions and data.



Avii Solutions

- > API Connectivity
- > Project Management
- > Client Portal & Workspace
- > Secure Document Exchange with MS SharePoint Integration
- > Automated Actions
- > Tasks Management

Summary

Anders and Avii are collaboratively driving Change Management, aligned with common goals of displacing multiple traditional software tools, and introducing greater automation, efficiency, continuity, and effectiveness across the firm.



"Anders recognizes the transformative potential of technology in enhancing our processes and client experience. After carefully evaluating leading software providers, Avii emerged

as the frontrunner. We are heading into our second busy season utilizing Avii and broadening the number of clients that will be fueled by Avii. Our teams are currently engaged with Avii to work towards expanding our automations, interconnecting more of our software systems, and gathering more live data into our data warehouse to drive real-time reporting and business intelligence. Avii has become not just a vendor, but a true collaborative partner that understands our needs and is ready to offer practical solutions. With a dedicated CES team, both Anders and Avii are working together to even further enhance and prioritize the capabilities of the platform.

TYLER KABERLINE IT SENIOR MANAGER AT ANDERS

About Anders

Location: St. Louis, MO

Website: anderscpa.com

Anders is a team of CPAs and industry-focused advisors. Every day, their partners and staff serve as a catalyst for those striving to achieve their highest potential, and they carry this mentality on to their clients and community. Through a collaborative approach and a combination of tax, audit and assurance, and advisory services, they help clients achieve their goals while focusing on what matters most.