



**HEADQUARTERS**  
Midwest



**SIZE**  
Regional



**AUTOMATION LEVEL**  
Advanced



**SPECIALTIES**  
Named One of 2023 Best  
Accounting Firms to Work For

## Avii Workspace Improves Data Integrity for Varney & Associates, CPAs, Elevating Data Consistency and Unveiling Robust Insights



### Avii Impact

- > Provide data integrity
- > Automate more processes, workflows, and data
- > Prioritize and organize projects and tasks with Project Queue
- > Unify work to reduce firm silos
- > Improve experiences for both clients and firm employees

### Before Avii

With more than 60 years of accounting experience, Varney & Associates is committed to providing their clients with quality service, mutual trust, and integrity with confidentiality. Varney sought to uplevel their accounting technology and searched for ways to unify and maximize their data usage. In addition, they wanted to streamline their disconnected processes and create more effective workflows. Varney wanted to create a more unified experience for clients and practitioners in a unified portal and workspace.

#### Main Challenges

- > Data was not complete, accurate, and up to date
- > Queries were incomplete or inaccurate
- > Rollovers and other project data were inconsistent
- > Project management was compliance-driven and statutory
- > The firm did not follow due dates consistently or have meaningful prioritization
- > Different tools were used for different firm teams
- > Clients were required to use separate devices/portals for sending and receiving their documents
- > The client experience was transactional



*“Avii is my favorite software. It’s helped to advance our firm in terms of data integrity, streamlined our processes, and unified more of our accounting work into one place.”*

**TAMMY BRYANT**, OWNER, CPA

### After Avii

Varney employees now trust their data and the tools used to query it. Their Avii Workspace toolbox offers live automations, including Avii Project Queue, a 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. Avii Project Queue also replaces static reports and searches across multiple software systems with a single, live visual dashboard that unifies status and data in customized visualizations for both clients and employees. Avii Project Queue querying and data sorting were key tools that Varney needed to enhance their data integrity. They also leverage dynamic automations that support their Lean Six Sigma Processes. Avii Workspace provides a more reliable project management tool, managing the workload for all teams and service lines.

Avii Workspace unified the Varney firm user experience by improving and increasing personal accountability. In addition, it significantly uplifted their client experiences with a unified portal + workspace. Varney is now able to create new projects with trusted data via Automated Rollovers, along with deliverables tracking to help establish specific due dates and meaningful prioritization.

## After Avii Continued

### Avii Workspace Includes:

- > **Data Consistency:** Avii provides access to the right data, so firms can streamline processes, become more efficient, and make better business decisions.
- > **Live Automations:** Access to robust, live dashboards, like Avii Project Queue, for real-time information.
- > **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.
- > **Increased Clarity:** Avii integrates in-context discussions with document request lists to increase clarity while maintaining security.

Varney and Avii's partnership resulted in big data insights, streamlined processes, and effective automations with both practitioners and clients having connected experiences within a unified workspace.

*"Setting up Avii Workspace competencies to get notifications when a project was in the queue was life-changing! No more excuses that staff forgot to check the queue. Our team experienced great success with turning on notifications and met our turnaround goals for all projects since it was activated! - Tammy Bryant, Owner, CPA"*

## Getting Started

Avii worked closely with Varney to identify data sources and opportunities to clean and correct their data. As a means to help streamline their operations, they reviewed Varney processes and incorporated them into Avii Automation configurations. Our focus was on prioritizing change management needs and establishing a plan to implement changes over time.

In terms of future expansion with Avii, Varney is looking closely at tools in the Financials module, including resource planning, timekeeping, custom reporting, and invoice management.



*"Avii's software has positively impacted the quality of our data and how we are able to leverage it for insights into our daily work. It also helped us streamline disconnected processes and become more effective and efficient as a firm."*

**AMANDA VANKLEECK** PRINCIPAL CPA, CNAP

## About Varney

**Location:** Manhattan, KS

**Website:** [varney.com](http://varney.com)

Varney & Associates, CPAs, LLC was founded by T. William Varney in 1959. As a sole practitioner, he started business with 18 tax clients. Our firm now includes ten owners and is led by our Executive Committee.

Michelle Crow, our CEO, leads a vibrant team of professionals dedicated to helping over 2,500 clients achieve business and personal goals. The firm has experienced a few name changes through the years, and people have come and gone, but the foundation is still the same.



## Avii Solutions

- > Avii Workspace™
- > Live Dashboards
- > Dynamic Automations
- > Project Queue
- > Client Portal
- > Document Exchange with Avii Native Storage
- > Projects, Tasks & Workflows
- > Integrated Communication
- > Avii Data Warehouse