

SQUIRE

HIGHER PERSPECTIVE



HEADQUARTERS
United States
West



SIZE
Regional



AUTOMATION LEVEL
Advanced



SPECIALTIES
Tax, Audit
& Advisory

Defining the Client Experience: Improved productivity and transparency by unifying and streamlining resources



Avii Impact

- > More than 500 hours per week saved
- > Increased by 300+ billable hours per week
- > 75% improved client satisfaction

Before Avii

Like many mid-sized accounting firms with several hundred employees, Squire has searched for several years for software automation that could meet their specific requirements.

In particular, as a leading regional firm with several hundred employees, Squire's strategic acquisition of fellow Salt Lake organization Pinnock, Robbins, Posey & Richins, P. C. (PRPR) in 2018 made integrated workflows and continuity especially acute. The two groups faced the extra urgency of helping the formerly separate systems and teams to converge.

Main Challenges

- > The Workflow system lacked speed and stability, adoption, check-in/out functions and file structure.
- > The File Cabinet content system continually crashed, and it didn't serve all areas of the firm.
- > The antiquated Thomson NetClient portals limited their abilities, and at the time of the acquisition, only the tax team used them.
- > Multiple programs handled the Document Exchange process, which made for a lack of continuity in client requests.



Avii Workspace™ allows Squire to streamline processes across the firm and create transparency in how we work for and with our clients. This is greatly enhancing the experience of our staff and our clients.

BRANDON ALLFREY PARTNER AT SQUIRE, UTAH DELEGATE TO AICPA AND BOARD MEMBER OF THE UTAH ASSOCIATION OF ACCOUNTANTS (UACPA)

- > Project and People Management lacked the required insights.
- > Client Management required better correlation.

Other Challenges

- > They used disparate systems between and within practice areas, making continuity in client delivery and inter-department collaboration difficult.
- > Culturally, personal preferences trumped expected firm processes.
- > The company wasted money by subscribing to multiple software tools to do the same things.
- > Managing network and program access became increasingly difficult for some of the teams.

In all, the company sorely needed a one-firm approach to its foundational operations as the least common denominator to set the stage for further automation beyond. They needed a systematized and automated approach to engagements that would benefit staff, clients, and the firm as well as better work/resource management and transparency of work in progress for clients in all areas to benefit the staff, clients, and the firm overall.

After Avii

Intelligent Automation

Avii provides a superior solution for all of Squire's automation requirements for transparent and optimized workflow across its multiple locations at a much lower cost than custom development. Once a customer securely uploads their documents, their account team automatically receives an alert and begins reviewing the documents. Upon approval, they're moved along in their journey with the knowledge of exactly where they are and what they need to do at every stage of the process.

Squire's first steps have been the use of Avii workflow support for proposal delivery and signing and client onboarding. Following this, they will progress into workflows that pertain to the actual work being done, starting with projects that are conducted by the Sales Tax team.

Secure Document Exchange

Squire provides the ability to securely upload documents, no longer requiring clients to use clunky, non-secure FTP sites, emails and physical data files. With a few clicks of the mouse, clients can log into a secure portal and easily upload their data.

Client Transparency to Work

And because they're using the unified Avii Workspace, clients and teams have full transparency to the work being done. Clients receive notifications when the firm accepts, annotates or rejects documents they've shared. With Avii powering the workspace, clients stay informed and work moves along faster.



Avii Solutions

- > Document Storage
- > Client Portal
- > Secure Document Exchange with Microsoft OneDrive integration
- > Projects, Tasks & Workflows
- > Client Management
- > Resource Planning with Time, Billing & Reporting

Getting Started

Squire's need and interest in a unified platform has been present for several years, but the company's mid-2018 acquisition made the need for streamlined workflow and process management through a single vendor and a unified portal paramount to their current success.

"We'd been searching the accounting industry for a unified client portal to provide us with the automation, workflow and transparency we needed to unify our disparate teams after the acquisition of PRPR and to take our execution to another level," said Brandon Allfrey, Partner at Squire. "Avii has answered that need."



Avii is providing new opportunities for us to work in ways that save time and add value.

JONYCE BULLOCK CPA, CEO OF SQUIRE

About Squire & Company

Location: Orem and Salt Lake City, UT

Website: squire.com

Founded in 1973, Squire is one of the largest regional full-service accounting firms and has been named a Best Company to Work For by both Utah Business Magazine and Accounting Today. The company is known for its forward-looking approach to the adoption of new technologies as well as its ability to lead out with a diverse culture and a women-forward leadership team. The company is a standout representative for excellence throughout the region it serves.

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