

# withum<sup>+</sup> experience



**HEADQUARTERS**  
United States  
Northeast



**SIZE**  
Top 25 National  
Accounting Firm



**AUTOMATION LEVEL**  
Advanced



**SPECIALTIES**  
Audit, Tax  
& Advisory

## Withum Experience, Powered By Avii Improves Firm Efficiency While Increasing Client Satisfaction



### Avii Impact

- > Available to 1,200 users throughout the firm
- > Accounting automation replaces busy work
- > Significant communication improvements between team members and clients

## Before Avii

Withum is a longstanding audit, tax and advisory firm that ranks as a U.S. Top 25 with a forward-thinking and tech-driving culture and an emphasis on “better workspace automation for better client experiences.”

In its effort to continually remain at the forefront, the firm created the internally-curated Innovation Council in 2017.

### Main Challenges

- > Some task lists were still being managed manually
- > Email communication needed absolute security
- > The ability to reach clients could be further improved

To further address these issues, the firm charged its Innovation Council with using their top-tier research, analytical and technology resources to discover, test and deploy ideal automation technologies available for use by their accounting professionals. From those efforts the relationship with Avii and the development of Withum Experience, Powered By Avii has emerged.



Many of our clients are finding the [Avii] platform easy to navigate and are finding it simpler to highlight and expedite the clients and actions that need immediate attention. As we continue our integration we envision the ability to serve our customers more efficiently through the Avii Workspace™ portal.

**GITA SEHGAL**, CONSULTANT AT WITHUM

## After Avii

As a recent and notable outcome of its partnership with the tech platform company, one of this firm's newest technology solutions is a customized version of Avii Workspace™, Withum Experience Powered By Avii.

Avii developed specifically for the firm's purposes to provide their team members and clients with access to a significantly improved and automated engagement workspace and client portal.

### The Avii Workspace™ Includes

- > **Newsfeed:** A new and constant Withum news site that delivers thought leadership articles based on industry, topics and niche.
- > **Increased Clarity:** The Withum Experience integrates in-context discussions with document request lists to increase clarity while maintaining security.

- > **Outlook Calendar:** Adds the ability to update and review calendar items through the Withum Experience.
- > **Box Integration and Bi-directional Syncing:** When a client uploads documents, whether through Box or the Withum Experience, the permissions, rules and best practices will inherit the native Box settings.
- > **Significant Time Savings:** Client and team members easily discuss documents, tasks and other questions with the Avii Workspace™. Because the discussions occur within a centralized location, it's easy to keep track of conversations around sensitive information.

Most recently, the creation of Avii's integration with Box in October 2018, was jointly premiered by Avii and this company during the BoxWorks 2019 event in San Francisco.

"Withum Experience, Powered by Avii, allows all interactions by the company's team members and clients to occur within a single portal ensuring all engagement related discussions and documents are secured in one place. This saves times and reduces frustration related to tracking items and questions," said Gita Sehgal, Consultant for Withum.

In all, the partnership between Avii and Withum has resulted in a solution that has made Avii Workspace™ capabilities available as an alternative for an entire 1,200 network of team members and clients, resulting in increased transparency, real-time status and big data insights for these employees and their customers alike.

Clients have loved the increasingly stronger support they receive from the Avii Workspace™ development as well.



## Avii Solutions

- > Document Exchange with Box integration
- > Avii Workspace™
- > Client Portal
- > Projects, Tasks & Workflows



*Our collaboration with Avii has been instrumental in helping us achieve our goal to streamline, automate and communicate engagement status in ideal ways with our clients.*

**GITA SEHGAL**, CONSULTANT AT WITHUM

## Getting Started

The Withum Experience Powered By Avii is one of the most significant outcomes of Withum's Innovation Council. Their Innovation Council played an integral part 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 teams and their clients.

## About Withum Smith + Brown, PC

**Location:** Princeton, New Jersey

**Website:** [withum.com](http://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, Washington DC, Orlando and Irvine, California.

"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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