

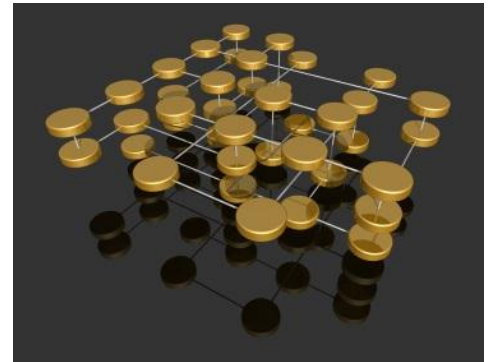
"I'm sitting in Palm Springs right now and I'm dealing with client files and reviewing financial statements and working papers. I can do this because I'm entirely digital. It doesn't matter where in the world I am, I can always look at that complete package, correspond with my clients, share information with my partners – all as if I were at my office desk. The only difference is that it's not 25-below outside. Life is tough but technology has made it bearable."

Barry Frank
Partner

Hergott, Duval, Stack LLP
Saskatoon, SK

Integrating for the Annuity

It took a couple of years of searching, but Hergott, Duval, Stack has finally realized its vision of a fully functional paperless office. Barry Frank was initially pessimistic about finding a software solution that could be seamlessly integrated into a firm with a staff of 85 representing the full spectrum of competencies when it came to computer literacy.



"We knew we had to enter the paperless world, and our office administrator started doing research into different products and different options that were out there," Frank recalls. "We came up with three or four solutions, and BAI stood out. After our initial conversations with them, we were sold on their process and solution."

BAIWay ClientDocs™ won the day with its uniquely interconnected, multi-component accounting and general office software platform. "Step One was to start using CaseWare properly and using its horsepower in a more effective manner," says Frank." Step Two was the total **BAIWay™** solution: We had BAI work with us to implement the entire group of software products to make it all run in a synchronized

fashion. It was the whole best practices solution that BAI was bringing to us. I mean, each software package on its own is very good and powerful, but if we're not using the features of one to assist us with the next one, then you're missing out on the power," he explains. "BAI saw that you had to tie in the whole applications software world together to produce a good and efficient office solution."

BAIWAY CLIENTDOCS™

Key Benefits

- Firm Wide Document Policies
- Efficient Application Integration
- BAIQuickVids™
- BAIWay Webinar Series™
- BAIWay Coaching
- BAIWay Associate Firms Collaboration

PATHS FOR SUCCESS

- Knowledge Transfer
- GoLive Instruction
- Reinforce Refine Solidify Tutorials™
- BAIWay Webinar Series™

DOCUMENTATION

- Policies + Protocols Manual
- Configuration + Protocols Manual
- Online KnowledgeBase
- BAIQuickVids™

MANAGED SERVICES

- Integration
CaseWare, MS Office, Doc.It, Taxprep/Profile
- Deployment
New technologies best practices
- Collaboration
BAIWay Associate Firms
- Management
Application configuration
- Research + Development
Emerging technologies

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Still, there is a lot to absorb working effectively with the dozen-plus software applications offered in **BAIWay ClientDocs™** arsenal. HDS was understandably concerned, only to be soon assuaged once BAI's highly structured training regimen and **BAIWay QuickVids™** instructional chats kicked in. "With BAI coaching us, our comfort level has increased exponentially," says Frank. "A lot of people here struggled initially," he admits, "but it seems like a light bulb came on one day and they got it ... as well as got into it.



They started saying: 'All the information I need is just a mouse click away. I can work on everything! The archives are right in front of me and are easily accessed for anything I want.' So they say: 'Yeah, this is fantastic.'"

HDS is now entirely paperless, its files reduced safely and securely to bits and bytes. "It's looking unreal, and we couldn't be more pleased," Frank says with some relief. "We can just see the extraordinary annuity from this whole process. It's becoming so efficient with everything in the archive and the electronic filing system, we just don't need all the man-hours and people anymore. One of my partners came to me the other day and asked 'Do you think this time next year we're going to be over-staffed?'"

Hergott, Duval, Stack now enjoys...

Consistent approach for the entire team

Quick response to client inquiries, with the Archive within arms reach

New protocols which were enforced at regular intervals during implementation to ease the learning curve

Increased security on archived documents