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Chris Van Niekerk
Partner
Powell Jones LLP
Barrie, ON

Implementing a Framework for Change

If not now, when? That was the question hanging in the air at Powell Jones in Spring 2018 when it approached BAI to help it to move to a paperless office. Founded in 1952 in downtown Barrie, Ontario, the six-partner, 35-staff full-service accounting firm had established itself through the strength and knowledge of its leadership and people and its client-first focus.

Its processes and systems were entrenched and worked well. There was no real urgency to change. This was particularly true for staff who had been with the firm 10, 15 years. Younger people coming into the office were surprised it was 100% paper based. For others, it was a deterrent. Clients had also started asking why the firm wasn’t sending electronic files.

“The push to transition to paperless was to be more efficient and to keep up with the times,” says



BAIWAY CLIENTDOCS™

Key Benefits

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

Chris Van Niekerk, a principal with Powell Jones in charge of the transition. “There were people who didn’t want to change, but ultimately it was understood this needed to happen. Dwayne Bragonier came in and did an excellent presentation.

“Our files are much more consistent and streamlined”

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He helped us understand we weren't fundamentally changing. Instead of looking down at a piece of paper, we would be looking up at a screen.”

It wasn't the firm's first attempt at going digital. Powell Jones had tried to transition to paperless with a few files, but they were not able to get the process down and their understanding of the software was not comprehensive enough. “Dwayne and his team were instrumental in showing us the how. The cost of going paperless without BAI would have been astronomical,” says Van Niekerk.

In November 2018, after three weeks of intensive training in **BAIWay ClientDocs** to understand and adopt the new practices and protocols that would set the firm up for the future, Powell Jones went live with the transition. “**ClientDocs** was the perfect training mechanism for that,” says Van Niekerk.”



Working better, more consistently

One year later, adopting **ClientDocs** has resulted in the firm changing its training process. Rather than having an existing staff member spend three days individually onboarding new staff, new hires leverage BAI's knowledge library of training videos, which require users to work through files as they learn the protocols.

The biggest benefits to date: Powell Jones has converted 100% of its corporate files to digital and the firm is “doing things better.”

PATHS FOR SUCCESS

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

DOCUMENTATION

- Policies + Protocols Manual
- Configuration + Protocols Manual
- Online KnowledgeBase
- BAICoach's Corner™

MANAGED SERVICES

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

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“Our files are much more consistent and streamlined. They all look the same, which helps because anyone can pick up a file and start working on it,” says Van Niekerk. “As well, the education we received has taught us about different, smarter ways of doing things. There was a lot we didn’t know about Caseware. It was always there, we just never questioned it.”



A gateway to what’s possible

Van Niekerk describes **ClientDocs** as the framework for change. “You can’t do much without being paperless. Now we’re talking about implementing a client portal and remote access which could then lead to a flexible work environment and working from home. Last year remote access was not on the table. Now partners are more open to the possibility. Without BAI supporting us, we would not have been able to do any of this.”

There has also been an unexpected health benefit. With the move to digital, the office now has 20 standing desks. “Before, when everything was paper-based, I was sitting all day and used to get stomach pains because I was crunched down all the time,” says Van Niekerk. “Now, I stand most of the day and the pains are gone.”

Powell Jones now enjoys...

Attractive environment for new staff members and clients alike

Consistent and streamlined files

A foundation for additional digital solutions