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Chris Reinhardt

Partner

Glenn Graydon Wright LLP

Oakville, ON

Realizing the Value of a 21st Century Office

A generational shift. Growing client demand for value beyond financial statements and assurance. The war for talent. In 2018, these trends were all converging inside Glenn Graydon Wright LLP (GGW), a 30-person CPA firm in Oakville, Ontario founded in 1957 and firmly rooted in systems that had not kept up with the data age.

For more than 60 years, GGW has set itself apart with its proactive approach, high level of client communication and responsiveness. But in 2018, the firm was still 90% paper based and had fallen behind many of its clients that had already digitized their offices. After the retirement of two of its four partners and the firm moving forward with its



third generation of leaders, it was time to modernize. The management committee adopted **BAIWay ClientDocs** to position the firm for the future.

BAIWAY CLIENTDOCS™

Key Benefits

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

“It was a good time to look at things we had been doing for a long time but could do better and more efficiently,” says Chris Reinhardt, a partner at GGW who is leading the firm’s digital transformation. “We were a relatively early adopter of scanning and doing paperless T1s and saw a lot of benefit from that, but we never made the change with the rest of the office. I had been seeing clients make the move, too.

“Working with BAI has led us to ask ourselves why we’re doing things. That’s part of the ClientDocs protocol.... It has helped improve efficiencies and consistencies in how we do things on the back end with our admin staff. Wow, it’s had such a positive impact.”

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One year they would provide a binder of paper documents and the next they were providing all their files on a USB. It was important from a competitive standpoint to stay current with clients and other CPA firms.”

It was also important to provide the tools and systems that would allow current and future employees to work smarter, not harder. “When you are trying to attract key staff, if they are used to working in a paperless world, they don’t want to go back to a paper world,” says Chris Taylor, tax partner at GGW. “At the same time, clients don’t just want an audited statement. They want more value. That’s where we are trying to focus. Working in a digital environment allows you to quickly access information for analysis and decision making.”

As part of the **BAIWay** protocols, GGW identified a committee of champions, four to six people from across the organization to become the go-to people for **ClientDocs** implementation. This group received in-depth training sessions from a **BAICoach** on various aspects of implementation. “After those sessions, the committee used **BAIAcademy**, an online knowledge academy of training videos where you do your own file along with the video so you can practise what they are showing you,” says Reinhardt.



GGW went live with **BAIWay ClientDocs** in December 2018. At that time, everything was printed to a file. Today, the printer outside Reinhardt’s office is largely quiet. “We’re about 80% paperless. Partners have gone from bringing physical files to meetings to bringing their laptops or projecting data on the television screen in the boardroom,” he says.

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

For more information on any of our products or services please visit us on the Web at: bai.ca

Questioning the status quo

Perhaps the greatest benefit to date has been the need as part of the transformation to review and assess the firm's processes with an eye to finding a better way. "Working with BAI has led us to ask ourselves why we're doing things. That's part of the **ClientDocs** protocol. I've been on a bunch of calls with our **BAICoaches** and they'll say, 'Why are you doing that?' We've always done it that way is not a good reason," says Reinhardt. "That has helped improve efficiencies and consistencies in how we do things on the back end with our admin staff. That's been a big impact." Another big impact: a better understanding of Caseware, which is part of BAI's training. "When we started, we were probably using 20% of the capabilities of Caseware. Now we are using much more. There are ways to communicate things in Caseware that we had maybe been communicating on paper or some other way that was less efficient."



Looking to tomorrow

For his part, Taylor is excited about the firm's latest evolution. "It's improving efficiency, access to information and ensuring we don't risk being left behind. The future is good. The future will pay benefits."

GGW now enjoys...

On demand access to content in client meetings

A partner in gaining efficiencies

Better understanding of accounting apps