



CUSTOMER

Kiesling Associates, LLP

HEADQUARTERS

Madison, Wisconsin

Number of Locations

Six

Number of Employees

85

CaseWare SmartSync™ Offers a New Level of Collaboration for Kiesling Associates, LLP

The mission of the accounting and business consulting firm of Kiesling Associates, LLP is to provide timely, quality services that exceed the expectations of its clients. The firm is succeeding in its mission; it continues to grow its client base and attract experienced professionals to work in its six offices across five states. Kiesling Associates continually looks for ways to streamline operations, increase efficiency, and improve its service levels. For a long time, the firm has relied on **CaseWare® Working Papers**. The recent addition of **SmartSync** is already transforming the way its associates and partners work.

Enhanced Collaboration

Jessica Richter, CPA.CITP and an audit manager with Kiesling Associates, understands the benefits of CaseWare solutions well. "I head up the CaseWare development for the firm, provide internal training, and am an authorized CaseWare instructor," she explains. "We use CaseWare products internally, and offer training courses and consulting services to other firms as they implement the software."

Working Papers, a highly flexible engagement software, has revolutionized the way accounting firms such as Kiesling



Associates work by providing them with the ability to produce next-generation financial reports, ensure standardization, and optimize the review and audit process. "CaseWare Working Papers helped make the paperless audit a reality," says Richter. "And SmartSync takes our audit work to a whole new level of collaboration."

Increase Productivity

SmartSync is an add-on to CaseWare Working Papers that delivers unprecedented online collaboration. With SmartSync, instead of one person checking out a file at a time, multiple team members can work with copies of client

CHALLENGE

Kiesling Associates, a longtime CaseWare advocate, continually strives to increase the efficiency and productivity of its staff, spread across six offices in five states.

SOLUTION

SmartSync, an add-on solution for Working Papers, facilitates an unprecedented level of collaboration between team members, regardless of physical location.

RESULTS

Ability to work on client files at the same time. Fast synchronization performance because only changes are sent. Real-time updates to the entire team. Additional level of security in the event of hardware failure.

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Jessica Richter
CPA, Audit Manager

About CaseWare International Inc.

Accountants and auditors in practices large and small, in corporations, and government recognize CaseWare International as the premier creator of assurance, reporting and analysis tools. In over 130 countries, the CaseWare family of products helps accounting professionals perform their work more easily and efficiently.

files in real time. These files are continually synchronized with the master copy and with each other to ensure that all team members have access to up-to-date information, regardless of whether they are working in the office, at a client's site, or from home or a hotel room.

"It is efficient and convenient for multiple staff members to be able work on a project simultaneously, without wasting time checking out or waiting for someone else to check in the file you need," Richter says.

Changes made by offline team members are automatically synchronized when they get back online. Because only changes are synchronized, bandwidth is not an issue and performance is excellent. SmartSync doesn't require new infrastructure, additional servers, or new hardware.

Eliminate Geographic Limitations

"SmartSync allows us to be much more productive," says Richter. "Now we can have field personnel and office personnel both working on the same file at the same time. Partners can review the status of an open engagement from their office, before they head out to the client's site."

Kiesling Associates often brings together staff members from multiple offices, and even multiple states, to work on an engagement. Using SmartSync, the geographic limitations that used to encumber these projects are gone. "Now each individual can work with the current file in their own office. Drive time is eliminated, which saves time and money," notes Richter. "Old restrictions have been lifted. We can assign staff to the projects they are best suited for without being constrained by geography or inclement weather or time zones."

Eliminate Peer Pressure

CaseWare PeerSync™, a feature within SmartSync further expands the software's usability. Off site users can efficiently pass file updates and changes within their team, with or without updating the master copy. "With PeerSync, we can have a team working at a client site, each one accessing the data they need and seeing the updates of their team members in real time," explains Richter. "It's fast, because they are accessing the file on their own machines and only sharing changes, not reading and writing the entire files to and from a server."

With SmartSync, each member of the remote team is working from a local copy of the file. As a result, there are multiple back-ups in the event the server machine should experience a failure. In addition, if the network connection is lost, SmartSync automatically puts users into an offline state, storing the changes until connectivity is restored and preserving the users' ability to continue working.

Smart Conflict Resolution

Richter praises the conflict resolution logic utilized by SmartSync. "There are inevitable conflicts when you have multiple people updating the same file," she says. "SmartSync handles those conflicts in a very logical way. Many conflicts it resolves automatically, notifying users of the resolution. For others, each user receives a notification of the conflict so they can determine the best resolution."

Work Without Restrictions

"SmartSync is another tool we use to stay on top of industry trends," Richter concludes. "SmartSync provides us with tremendous flexibility with regard to the who, what, when, and where of our work."

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