



CUSTOMER

Wipfli LLP

HEADQUARTERS

Milwaukee, Wisconsin

Number of Locations

14

Number of Employees

800+

SmartSync™ Helps Wipfli Increase Productivity And Expand Collaboration

Since 1930, Wipfli LLP has been creating value and securing the future of its clients, their businesses, and the community at large. With unmatched breadth and depth of experience, over 800 Wipfli team members are trained to help individuals and businesses of all sizes streamline processes, improve performance, and leverage the right technology to stimulate financial growth. Named by *Accounting Today* as one of the Top 30 Accounting Firms, Wipfli serves as a trusted business advisor to more than 20,000 clients from its 14 offices throughout Wisconsin and Minnesota.

The company has a reputation as a flexible, technologically-advanced organization, and turns to **CaseWare® Working Papers** and **CaseWare SmartSync** to help maintain and build upon its reputation.

Collaborative Tools Empower Staff

A long-time promoter of Working Papers, Wipfli invested in SmartSync as a way to empower its staff with flexible tools that enable them to do their jobs more efficiently and in a more collaborative fashion.

“We have been using SmartSync for about three years,” says Richard McClure, a



business analyst with Wipfli. “It provides anytime, anywhere access to the data we need to do our jobs and meet our clients’ needs.”

SmartSync allows multiple team members to work with copies of client files in real time. The copies are continually synchronized with each other and with the master copy, ensuring everyone has access to the most current information. When a user is working offline, SmartSync queues the changes, and synchronization occurs the next time the user is online. It is a highly effective tool that boosts collaboration and drives efficiency.

Eliminate Geographic Limitations

Accounting firms have traditionally been very geographically focused, in part because of the limits long distance places on coordination of their work.

CHALLENGE

As a longtime user of CaseWare Working Papers, Wipfli continually invests in its technology infrastructure to drive efficiency and improve its service offerings.

SOLUTION

SmartSync, an add-on for Working Papers, boosts collaboration and drives efficiency by removing geographic limitations.

RESULTS

Anytime, anywhere data access adds flexibility and promotes work/life balance. Real-time updates ensure the entire team has access to current data.

"CaseWare SmartSync is a game-changer. There is no other program out there like SmartSync – it is a generation beyond."

Dan Szidon
Partner in Charge, Audit and Accounting

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.

"Because so much of our work has to be done with staff physically at the client site or at the office working on hard copies of a client file, we were not able to stray far," explains Dan Szidon, partner in charge of auditing for Wipfli. "CaseWare Working Papers and SmartSync opened up our territory by allowing us to work collaboratively from anywhere. Whether at a client site, hotel, home, office, or airport, we are able to assemble the right team regardless of where they are based."

"The old model of a team tethered to a location office is obsolete," adds McClure. "SmartSync removes the tether."

Gain Momentum

Project momentum is preserved because changes and updates are synchronized in real time, without the need to check out and check in files.

"You can't underestimate the value of momentum," Szidon says. "When you are able to work on a project without interruption and with the benefit of others' input, you are more productive. You get more done in less time, and it is work of a higher quality."

Improve Work/Life Balance

Wipfli strongly encourages its staff to maintain a work/life balance; SmartSync helps with that balance. "It gives us great flexibility as we can work when we want to,

wherever we are. Previously we might need to stop off at the office after a day off-site, to upload our work and make it available to others," McClure says. "Now updates occur as we work. So, at the end of a day, we can go directly home."

Szidon adds that SmartSync allows management to schedule work on engagements more efficiently because members of the team do not need to be physically together in order to work together productively. "I think of SmartSync as a workforce capacity multiplier," he says. "It allows us to bring together teams we might not have been able to assemble otherwise."

Fast and Accurate Synchronization

Both McClure and Szidon praise the powerful synchronization and conflict management features in SmartSync, and say it is comprehensive, intuitive, and fast.

"It is a powerful program that was very well designed and executed, just like Working Papers," says McClure. "Our firm invested in staff training and carefully planned out our processing workflow in SmartSync."

"CaseWare SmartSync is a game-changer," concludes Szidon. "There is no other program out there like SmartSync – it is a generation beyond. It gives us a breakthrough level of performance capability that is of significant value to Wipfli and our clients."

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