

“What BAI is doing is part of the WAY of the future. To ignore this fact would be foolish, and you’d be doing yourself, your firm and the profession a real disservice. So, I’d recommend them to anyone who is serious about getting their houses truly in order for the 21st century.”

Lowell Lowrod

Partner

Fletcher Mudryk Co. LLP

Grande Prairie, AB

## Document Management with a Real-World Mindset

Fletcher Mudryk has been providing the full gamut of accounting, audit and advisory services to the people of Northwestern Alberta for over 70 years. Deeply rooted in the world of paper, its partners have insisted that any electronic alternative be as close to their tried-and-true paper file system as possible – minus, of course, the dog-eared folders ballooning with inserts, revisions and hand-scrawled Post-its. In other words, the search was on for a typical working file, but one that would now be more accessible, more manageable ... and perhaps even fun to use.



After surveying the competition, FM’s Lowell Lowrod found that BAI offered the most comprehensive and commonsense of conversions to the paperless office. “Their process seems to be a more reasoned way of ensuring we can address the many issues involving how we deal with our work-in-progress and what is to be done once those files have been reviewed and completed,” he explains.

### **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

**BAIWay ClientDocs™** approaches client document management entirely from the real-world mindset of the busy accountant. Day-in and day-out, the focus is on both the open file (unpublished work-in-progress) and the final signed, sealed and stored product. “BAI made sense with their melding of the two main processes we work within every day,” says Lowrod. “One without the other in electronic form really offers only half the value and half the solution. So the benefit of the **BAIWay™** is the digital mimicking of how we work a file from the moment we receive client information to when we finally put it to bed in storage.”

Yet the **BAIWay ClientDocs™** process continues to live on even when the file is finally published and archived. For Lowrod, this third benefit accrues when his colleagues return to a client file for reference in future years. If the firm remains committed to **BAIWay ClientDocs™**, says Lowrod, a time/value benefit is sure to be realized because, he explains, “if it’s stored electronically, then it is far more easily accessed should we need it.

*Fletcher Mudryk now enjoys...*

*A solution that addresses both work in progress and the final product*

*Sound protocols for professional documentation requirements*

*Ease of access to documents in the future*



So I really like BAI’s method of ensuring that this endgame - archiving your files in a way that they can be both easily accessible and secure – was there to be realized. Otherwise, what’s the point?” he insists. “We want to be more efficient and cost-effective. You can’t do that if the process doesn’t operate from the beginning of a client file to its end. So full steam ahead ... and its working!”

For more information on any of our products or services please visit us on the Web at: [bragonier.com](http://bragonier.com)