

*“BAI has allowed us to implement a more consistent document management paperless process across ALL our offices. So, again, consistency, ease of getting to client information, and the fact that it’s all in one file.”*

Murray Bye  
Managing Director  
Chief Executive Officer  
MacKay LLP

## A Single Approach for Multiple Offices

Whether a firm is big or small, the ability to rely on a coherent and uniform process of working and accessing client documents is vitally important. Yet the larger the firm, the greater the challenge in ensuring all employees in all offices are working from the same set of underlying document management policies and protocols.



MacKay LLP, with its seven offices, ranging from Calgary to Vancouver, Yellowknife to Whitehorse, must be in no doubt that the 270 employees and partners who work directly with client documents strictly maintain these system standards. In 2010, MacKay was well on its way when it came to implementing a more consistent

and highly digitized policy of controls over its document management procedures. Still, a key piece of the puzzle was not yet in place. Working papers or unpublished files were being safely manipulated within CaseWare, but as for final published and archived documents, a decision on controls and processes had yet to be made.

**BAIWay ClientDocs™** has not only provided MacKay with the required protocols for completed files (such as the seamless integration of Doc.It to its mix of tools that lock down the published side of document management), it also offers an entirely

### **BAIWAY CLIENTDOCS™**

#### **Key Benefits**

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

paperless future, one that perfectly mirrors the movement of a client file through its many iterations within a busy accounting firm. BAI has created a new electronic platform of ‘best-of-breed’ software applications to help assure MacKay that all staff are working from the same script for both unpublished and published work-product. “I would say that that was pretty much what we were missing from our old paperless process,” says Michael Hubber, Firm-Wide IT Lead.

## 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

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“We didn’t necessarily have a change in medium. (We had all our old unpublished files within CaseWare and those kinds of applications.) So we were 75% of the way there with our other paperless process. I think just the concept of unpublished and published, in terms of electronic form, allowed us to get maybe 100% there.”



“The biggest thing we didn’t know in our paperless world,” admits MacKay’s CEO Murray Bye, “was consistency when it came to where certain things were filed outside of the normal year-end file. Like, a tax re-organization file – where was it?” BAI is presently helping MacKay with these detailed document management

policy decisions. The key is to ensure that the full electronic picture of the unpublished and published document is at work – separate, yet in tandem to allow the accountant the clearest and most accessible view of a client’s financial profile. “We’re just starting to get some of the published documents to the Archive,” says Bye. “Eventually that will happen, but right now there’s still a lot of paper in my office.”

For Bye and Hubber the long-term benefit of **BAIWay ClientDocs™** is a paperless system that inextricably links its far-flung offices with a uniformity of action *and* purpose. “A big chunk of it in our case is consistency amongst all our offices - that we’re all on the same page,” says Bye. “We’re looking to move towards more of a centralized model, and BAI is going to allow us to get to that more consistent platform, consistent methodology.”

*MacKay LLP now enjoys...*

Protocols for completed files

A view to a paperless future that mirrors the movement of paper documents through the office

A firm wide approach that addresses unpublished and published documents

A consistent platform and methodology for all client documentation, including those outside of compliance engagements