

“It’s human nature to resist change. That was the biggest part of the assistance from BAI – making sense of the process, answering those questions. We felt that if we didn’t have some guidance on processes and protocols to follow, it would have been very hard. So we’re pleased and relieved.”

Peter Winters

Principal

Noseworthy Chapman

Chartered Accountants

St. John’s NL

Archiving in the Digital Realm

For Peter Winters, one key piece to ease-of-use of the **BAIWay™** platform has been the ability of his staff to access instruction and advice via BAI’s extensive online library of **BAIQuickVids™**.

Noseworthy Chapman is a recent convert to **BAIWay ClientDocs™** paperless office and is in the process of refining its implementation of this uniquely

integrated toolbox of CaseWare, TaxPrep, Profile, MS Office and Doc.It applications.



“The training and video was very valuable in reinforcing how to work in the digital environment and how to handle it,” he explains. “The **BAIQuickVids™** were very helpful and we still go back to them to reinforce what to do, and what is best practice.”

As one of Newfoundland’s more progressive accounting firms, Noseworthy Chapman

was looking for a new technology-enhanced operating model to help it service business and government clients within one of the nation’s more volatile economic landscapes. “We expect the **BAIWay™** process to allow us to be far more responsive and more nimble as we face what are oftentimes quite distinctive challenges within our business community compared to the rest of the country,” he says.

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™

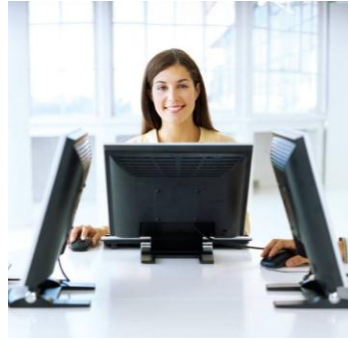
DOCUMENTATION

- 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

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The firm is presently moving through its first year of **BAIWay Knowledge Transfer and GoLive Instruction – ClientDocs™**; and the learning curve is steadily dropping, says Winters. “We did the initial BAI [**ClientDocs™**] implementation, then a little later the **Reinforce Refine Solidify Tutorials™**, and that was good. Luckily the process is working well,” he says. “People are doing their files correctly, and we’re fine tuning the file review process.”

With its training almost complete, Noseworthy Chapman is ready to move on to an entirely paperless working world, populating its Archive of client files entirely in the digital realm: “As to our [paper] storage, the good news is that we’re not putting *anything more* in there. We knew we had to start getting a handle on all this paper,” Winters laughs. “Everything that’s gone to storage has been scanned, and now we’re actively scanning the live-room. So that room is starting to get purged and we’re getting to where we’ll no longer have a paper reference to go to.”

Noseworthy Chapman’s ultimate goal of a paperless office that is fully operable, its work-product efficiently stored and accessible with the simple click of a computer’s mouse, is almost complete. “We’re building the filing structure and protocols that we’re going to be retaining and referring to in the future,” Winters explains. “I’d quite happily recommend BAI to anyone thinking about going paperless and making a good stab at operating in the modern world.”

Noseworthy Chapman now enjoys...

Access to resources, which increases engagement productivity

Quick response to client inquiries, with the Archive within arms reach

New protocols which were enforced at regular intervals during implementation to ease the learning curve

Elimination of costly paper storage