

Always Within Reach

Marco Simone is a partner in the Port Credit-based professional services boutique firm of parker simone LLP with approximately 16 professional staff. With referral relationships on six continents, the firm has a global reach beyond its Southern Ontario roots, providing not only audit and assurance but specialty consulting in tax, strategic planning, corporate finance and valuations and restructuring. In 2010, the firm implemented ClientDocs in part to satisfy its partners' globe-trotting needs. For years, Marco Simone knew he quite simply had to have a far better finger on the pulse of his flourishing business ... especially when he was far afield.



BAI offered just the solution...

BAIWay ClientDocs™

Key Benefits

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

“One of the huge benefits I saw early on was the time I had to go to Mongolia for a week. But I also had two audits that just had to get done in my absence. And one of my clients was extremely skeptical, saying ‘how could you desert me at such an important time?’ But there I was, reviewing his file on my laptop over 10,000 miles away. I could access his information from the company digital archive with ease, work the file, and when finished, I just sent it off. I got an email back from my client saying, ‘Wow, you really weren’t kidding when you said you could work from Mongolia.’ From that perspective, it’s a major benefit to the efficiency and marketability of our firm.”

“As a profession, whether we like it or not, the way we work and the way we service clients is being transformed by 21st century technology. The key to any proposed transition to a paperless office is a stable platform using computer hardware and software that is easy to adopt, is effective and offers realizable benefits and efficiencies to my firm’s workaday life.

“The transition to this electronic world was far easier than expected. It was really quite interesting how everybody in our office - even the administrative staff – so quickly adapted and simply continued on with both ClientDocs integration and our daily work.”

Marco Simone
Partner
parker simone LLP

It's a tough fit, because the only way we can realize any true value is if we can find a process that intuitively mirrors the paper-handling world we've become so accustomed to. The applications software for accountants that is out there is excellent, but it's been

very frustrating finding a way to 'automate' parker simone in a way that isn't catastrophically disruptive ... at least not until we took a long, hard look at ClientDocs."

~~"BAI's strength is its~~

~~people.~~

~~They know our industry~~

~~— in fact, they're a part of~~

~~the profession — and they~~

~~have an intimate~~

~~understanding of our~~

~~needs.~~

~~As a result, they so easily~~

~~communicate the feature~~

~~sets of ClientDocs in a~~

~~language we can all~~

~~understand."~~

"For parker simone, BAI had the answer. It's a no-nonsense approach to using today's software in a way that responds to even the worst fears of those who are resistant to giving up their paper files. ClientDocs offers a clear vision of how we should work a client's file in the digital realm.

What we all imagine when people say 'paperless' is a workplace entirely devoid of the stuff. ClientDocs, in fact, works with paper, but paper that is intelligently transformed into an electronic file that I can access quickly, work on, put away and come back to. And when I sign off on it, I can easily store it safely, and reference back to it with a click of a mouse.

The transition to this electronic world was far easier than expected. It was really quite interesting how everybody in our office - even the administrative staff — so quickly adapted and simply continued on with both ClientDocs integration and our daily work."

“ClientDocs is a seamless transition into a paperless office. Which is great; but more important is its practical integration of all hands-on elements of an accounting office’s workflow – from receipt to review, security to archive.

It’s a two-tiered process that addresses two coexisting yet separate elements: the file I’m working on; and the finished, issued document.”

Marco Simone
Partner
parker simone LLP

“BAI was key to a smooth transition. What BAI brings is the ability to distill things down into very simplistic terms in order for everybody to understand and to buy-in. Their people were at the forefront of this move.

Knowledgeable, open and patient – just what one needs. BAI has an intensive yet clear training regimen that’s augmented by several levels of coaching, online video and post-training follow-up.

It was a very collaborative process. We worked with BAI to develop a plan that would ideally suit our particular circumstances. The BAI people were always there to work with us and to develop a strategy to get this rolled out effectively.

The initial benefit? We’re just more efficient and staff morale is following suit. They’re working in a totally electronic world; it’s so cutting-edge, whereas other offices are still paper. It



gives them a sense of working at a firm that wants to stay abreast of technology and help lead the way, as opposed to following everybody.”

“Accountants are notoriously cost driven, so they have to see the bottom-line benefits. But that’s BAI’s strength – elucidating those value-added, consistent and real returns. I expect my paper costs to go way down. Then there’s storage costs – I don’t need that file room anymore; it now becomes a more productive space. I don’t need to worry about the security of expensive off-site storage either.

“What I’m looking for is a logical progression of technology that will realize straightforward, definable benefits. BAI now affords me not only greater efficiencies, but a time-value savings not possible in the “paper” world. In the future, I can only see greater and greater gains, as well as ease of use as ClientDocs evolves.”

But the real long-term benefit is a day-to-day efficiency and a time/value gain that's as bankable as cash.

A client wants something, and I don't have to go to a cabinet or storage area and pull out a file. Just a couple of clicks away and I'm there. While I'm talking to them on the phone, I can find it, look at it, print it to pdf and email it to them. Just like that.

Here's the old scenario: I go to the file room; it's not there --someone else has got it out; I chase them down; get the file; it's incomplete --someone else has parts of the file; the runaround continues.

With ClientDocs, I can access it right away – I can access it from wherever I want – Mongolia, Thailand, home – whenever I want, and without skipping a beat.”

“In the end, parker simone clients also see this transition as a definite benefit. They're employing a firm that's state-of-the-art and more willing to embrace the efficiency and accuracy that comes with going paperless using ClientDocs. Hence, our clients sense that we are more proactive in our thinking. So psychologically the message is sent. And I like that message.”

*parker simone LLP
now enjoys...*

A finger on the pulse of the firm,
even from another country

Stable, easy-to-adopt platform

Realizable benefits resulting
from a non-disruptive transition
to paperless

Greater efficiency, with staff
morale following suit

Pride and client confidence from
being a proactive, state-of-the-
art firm