

ALL TOGETHER NOW

Firm sees integrated software solutions as essential to doing business.

With 12 offices across Mississippi, **Watkins, Ward and Stafford, PLLC**, was starting to see inefficiencies working with a collection of standalone software programs. So after 23 years with another provider, the firm decided to switch to the CS Professional Suite from Thomson Reuters.

"The main reason we went to Thomson Reuters was for the integration among all of the modules," says Anita Goodrum, CPA, a partner at Watkins, Ward and Stafford. "We're a large firm, so efficiencies like only having to change a client's address in a single application instead of multiple ones was a driving force. Software is a lot less expensive than man hours."

The firm has already reaped benefits from economies of scale thanks to remote software access. It has gone from 12 servers to just one, which also reduces the cost of software licensing fees.

Goodrum says that the attentiveness of Thomson Reuters account reps is unlike anything they've ever experienced—and has been since day one.

"Do you want to know how many times we saw the sales rep from our previous provider?" she asks. "Once—when we decided not to renew with them. There's a lot to be said for customer service."

THE REMOTE ACCESS ADVANTAGE

Watkins, Ward and Stafford's team can access the software and information they need from anywhere there's an Internet connection. That's a significant advantage to a firm with multiple locations.

"There's no more being out at a client's business and saying, 'Oh! I left that back at the office,'" Goodrum says. "Plus, these days you really need to be accessible and responsive whenever your clients need you."

Although staff members don't work remotely on a regular basis, being able to log in to respond to a client is a plus, she says.

"Work-life balance in accounting firms today is nothing like it was 20 years ago," Goodrum explains. "People don't have to be at the office until two or three o'clock in the morning anymore. We have to offer some flexibility to our employees, and technology helps us do that."

THE FULL PACKAGE

Watkins, Ward and Stafford has been adding modules to its suite of CS Professional Suite products over time. One of the first? CS Professional Suite Accounting (CSA).

"The accounting package is very stable," Goodrum says. "When I first started with the firm we did a lot of after-the-fact payroll and write-up, and we still do in some of our offices. CSA is a great program for payroll and processing and everything else."

CS PROFESSIONAL SUITE



WATKINS, WARD AND STAFFORD, PLLC

Anita Goodrum, CPA

FIRM FACTS

BASICS—

With 115 employees in 12 offices across Mississippi, Watkins, Ward and Stafford works with individuals and businesses in a variety of industries. The firm's menu of offerings includes tax and accounting, auditing, bookkeeping/write-up, payroll, and advisory services.

WEBSITE—

At wwscpa.com, the firm provides resources including tax tools and news, financial guides, and helpful links.

SOFTWARE—

The firm is building a suite of CS Professional Suite® products, including CS Professional Suite Accounting, Practice CS®, Engagement CS®, and UltraTax CS®.



THOMSON REUTERS™

CS PROFESSIONAL SUITE

SYNERGY USERS' CONFERENCE: IDEA EXCHANGE

Anita Goodrum, CPA, a partner at Watkins, Ward and Stafford, PLLC, attended her first SYNERGY Users' Conference when the firm was considering switching to Thomson Reuters software.

When she went back for a second time, she brought two other staff members with her.

"We were getting everything ready to convert to UltraTax CS, so I wanted them to be able to focus on that," Goodrum explains. "I also wanted our firm administrator to explore the staff management and project management capabilities of Practice CS."

Being at the conference provided an opportunity to talk directly with Thomson Reuters staff about how the products might work for the firm. The conference gave them the chance to exchange ideas with other firms, too.

"Be prepared to be exhausted when you get home from the conference," Goodrum says. "You'll get a ton of information. I love networking with people from other firms."

UltraTax CS was a natural addition, made easier by being able to input tax codes into CSA to save an extra step in getting started with UltraTax CS. The firm also uses Engagement CS and Practice CS, and plans to add NetClient CS® in the near future.

Along the way, Thomson Reuters has been there to provide training and guidance to make sure the firm is getting the most out of the software—and in helping Watkins, Ward and Stafford learn how to better serve its clients moving forward.

"I never would have imagined 20 years ago where we would be today, with everybody carrying around their iPads with their handouts instead of the paper we all felt comfortable with," says Goodrum. "We've got to get out of our comfort zone to see where the next 10 years are taking us, because we're going to get there one way or the other."

