

OUT OF MANY, ONE

How GoFileRoom and the CS Professional Suite® keep this multi-office firm in perfect sync

CPA firms don't stay in business for 85 years unless they're willing to adapt to the times and the technology. **Williams & Company CPA PC**, founded in 1929, is not only willing but eager to take advantage of technology that allows them to keep their seven locations—five in Iowa and two in South Dakota—running as one seamless office.

For Williams & Company, that technology comes in the form of the CS Professional Suite. "We became a Thomson Reuters customer with UltraTax CS® in the 1990s," says managing partner David Radke, who is based in the firm's Onawa, Iowa office. "We went to Virtual Office CS® in 2007 because we needed to become more efficient and tie everything together—to do a better job of billing and working together as a firm."

In addition to UltraTax CS and Virtual Office CS, their current lineup of Thomson Reuters products include Practice CS®, Engagement CS®, ToolBox CS®, the Checkpoint® Learning CPE and training solutions, and the product that in many ways has done the most to put the firm on the same page: GoFileRoom®.

"Since I took over as managing partner in 2006, I've pretty much driven the 'Let's move to Virtual Office CS' initiative," Radke says. "From there, we looked at GoFileRoom because of the efficiencies we needed to accomplish."

Staff accountant Amy Maule agrees. "Our workflow process is much more streamlined since we went to GoFileRoom," says Maule, who is also responsible for training new Williams & Company staff on CS Professional Suite products. "The CS Professional Suite software makes it much easier to keep our client data consistent, and GoFileRoom really made us think about our process—the things we were actually working on and the steps that were each person's responsibility. It made us all take accountability."

Where Williams & Company really sees the efficiency of the GoFileRoom workflow process is during tax season—especially when an office is short-staffed for any reason. According to Maule, "Whether it's a tax return, an audit, or bookkeeping or payroll services, it's great to know we can originate something in one office and send it off to any other office to be processed. The staff there will know exactly what to do, and when they're done the project can come back to the originating office or finish being processed at any of our locations."

When asked about the single most important difference GoFileRoom has made, Maule has a ready answer.

"Our staff can find client documents, resource documents—even the documents they use to renew their employee benefits at the end of the year—all in a single place: GoFileRoom. It saves us from having to look in one place for our client information, in another place for our research information, and in yet another place for personal or personnel information. It's the best time saver."

Maule says the employees' feedback on GoFileRoom has been positive, and goes beyond the ability to have everything in one place. "They appreciate the search function, where they can—even with a limited amount of information—find exactly what they're looking for. It's a time savings for them."

GOFILEROOM®



WILLIAMS & COMPANY CPA PC

*David Radke, Managing Partner
Amy Maule, Staff Accountant*

ABOUT WILLIAMS & COMPANY

Year Established: 1929

Number of Offices:
7 (5 in Iowa, 2 in South Dakota)

Number of Employees: 65

Services Provided:
Accounting services; audits, reviews, and compilations; estate and trust planning; health care consulting; tax planning and preparation; wealth management; business valuation

Business Sectors Served:
Farming; nursing homes; government; not-for-profit; small business

CS Professional Suite Products Used: Practice CS; UltraTax CS; GoFileRoom; Virtual Office CS; Engagement CS



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MIDWESTERN WORK ETHIC

"Each office is a little different, but being in a farming community, pretty much every one of our offices offer tax planning and tax preparation to farmers," David Radke says. "In Onawa, we also work with nursing homes, helping them get reimbursement and making sure they survive in today's environment. Our other offices do a lot of governmental and non-profit audits—about a hundred a year.

"A lot of our shareholders have farm backgrounds, so that's why we understand the farm community. We're pretty hard-working, being from the Midwest, so we have no problem putting in the hours to get our clients the help they need, any time they need it."

Radke takes a longer-term view of what the technology of the CS Professional Suite can do for Williams & Company. "We're looking to hire about ten more people this year so we can continue to grow and provide opportunities for our employees. I'm responsible for not only making sure that the profits are there so we can continue as a firm, but for looking at how we use the software to our competitive advantage so we can attract the new hires out of college. They want to stay with technology, and they want to see a firm that's using paperless audits and other technology most efficiently.

"I think the profession will see even more technology in the next five to ten years. Hopefully we can keep the personalized service, because I think that's the secret to client retention. We take good care of our clients, and make sure they understand what they need to do. It could be a challenge with some of the newer employees—who would rather email than pick up the phone—but that's the key, to talk to people, to understand what they're saying. It might be a bit of a struggle, but since technology will continue to evolve, we'll stay with it."

FEELING THE SYNERGY

How does Williams & Company get the most out of the SYNERGY Users' Conference?

"We try to bring several employees with us," says David Radke. "We designate each person as a champion of a particular software product, and at the conference we spread out and ask the questions we need to ask. When we get home, every employee who attended is responsible for passing along what they learned to the various offices, either through memos or some sort of training session."

Adds Amy Maule, "My most valuable takeaway from the SYNERGY conference is the little tips and tricks I can give my staff to help them save time. They're things they may not have the time to investigate themselves, but I can learn them at SYNERGY and share them with everyone back at the firm."

