



CUSTOMER

Wipfli, LLP

HEADQUARTERS

Milwaukee, Wisconsin

Number of Locations

15

Number of Employees

800+

CaseWare Is A World-Class Solution for Wipfli, LLP

For over 75 years, Wipfli LLP has helped individuals and businesses streamline processes, improve performance, leverage the right technology, and increase financial success and growth. With over 800 professionals, located in 15 offices across Wisconsin and Minnesota, Wipfli serves thousands of clients across the United States. The firm's dedication to its clients contributes to its steady growth and status as a leading firm with more than \$100 million in revenue. CaseWare Working Papers is the electronic engagement software solution that Wipfli utilizes to support its world-class operations.

Growth Necessitates Change

Several years ago, Wipfli undertook a major expansion, merging with two other firms and adding 200 people to its staff. The firm was already in the process of reviewing electronic working papers solutions, but the expansion led to an expedited search. "Each of the firms we merged with was running a different electronic working papers system," recalls Dan Szidon, audit partner with Wipfli. "One was running CaseWare Working Papers, the other Prosystem fx Engagement. It made sense to look at those two solutions closely to determine if one would make the best firm-wide solution."



Select the Finest Solution Available

Ricky McClure, a business analyst for IT applications with Wipfli was enlisted to help find the best solution. "We formed a committee to compare the two solutions and to accumulate input from others throughout the firm," he says. "Ultimately CaseWare Working Papers was selected for its customizability, deep functionality, and scalability."

"At first, some were leaning toward another solution because they felt it would be easier to implement and learn. However, everyone agreed that CaseWare was the solution that best met our long-term needs," recalls Szidon.

"The software a firm uses says something about the firm—about its commitment to excellence," Szidon continues. "When we considered this, the conversations changed and we all agreed that CaseWare

CHALLENGE

When Wipfli merged with two other firms, adding 200 associates, it needed a system-wide electronic working paper solution.

SOLUTION

CaseWare Working Papers was selected for its robust functionality, flexibility, and scalability.

RESULTS

500+ associates and support personnel, in 15 locations, access and share data using Working Papers. The solution boosts efficiency and ensures a high level of consistency across the firm.

"Working Papers is evolving faster than others — CaseWare's approach to the future of electronic engagement software is vastly superior to that of its competitors."

Dan Szidon
Audit Partner

About CaseWare International Inc.

Accountants and auditors in practices large and small, in corporations, and government recognize CaseWare International as the premier creator of assurance, reporting and analysis tools. CaseWare's family of products and services helps professionals in over 60 countries perform their engagements more easily and efficiently.

Working Papers was the best solution to help us remain a world-class firm."

Wipfli implemented Working Papers for one region initially, and then rolled it out to every region in the firm. Now more than 500 associates and support personnel use the solution. "Once we got past the initial learning curve, the rest was easy," McClure says.

A Wise Decision

The decision has been a wise one for Wipfli. Recent changes in the accounting industry required accounting firms like Wipfli to make significant changes in their documentation procedures. "During an audit, companies need to supply documentation, not just numbers. They need to show how they got to those numbers," explains Szidon. "A strength of Working Papers is its documentation capabilities."

"From an IT perspective, Working Papers is a relatively bullet-proof system. It is fast and it's stable," says McClure. "We have assembled an internal power-user team to serve as the first line of support for technical questions users have about the software. We route the questions to the in-house expert on the topic and have become largely self sufficient in this way. We turn to CaseWare for high-level support and have found them responsive, expert, and capable."

A Powerful Tool

"I think of Working Papers as an incredibly smart filing cabinet," explains Szidon. "All our engagement documents are in one place and accessible by our co-workers. In it we can produce, review, and approve financial statements for our clients. Other

software can do some of this, but none can do it in the way Working Papers can."

Working Papers includes CaseView, a state-of-the-art report writer containing powerful design tools. "Using CaseView we can update and change standard forms, and then roll out the changes to the staff as a merged document. It ensures that everyone is using an up-to-date version," says Szidon. "CaseView delivers advanced functionality and capabilities that are vital to this firm."

Szidon and McClure agree on the benefits its Working Papers solution brings to Wipfli. "We've achieved a level of consistency and efficiency that save time and improve the end product," McClure says. "Working Papers is a tool that helps us improve the quality of our work, while saving us time and effort," says Szidon.

The Company Behind the Solution

"CaseWare is a large organization that we know will be there to support the product in the future, yet they are still small enough to care about individual customers. I can call and share our input on the product and they listen. We appreciate and enjoy working with organizations like CaseWare that share our same philosophy of personalized, attentive service," says McClure.

"In my opinion, Working Papers is evolving faster than others — CaseWare's approach to the future of electronic engagement software is vastly superior to that of its competitors," Szidon concludes.

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