

Case Study



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# Tait Walker Helps Its Professionals Find and Govern Content with Electronic Client Files Powered by Interwoven

Like most accounting firms, Tait Walker was all too familiar with the shortcomings of paper. "Our professionals were entirely reliant on paper engagement files, which they had to retrieve from the file room—if they hadn't already been checked out or lost—and page through to find what they were looking for," recounts IT Manager David Mulholland. Even then, the file was typically incomplete, often lacking handwritten notes, printed e-mails, and other relevant items. "When you have several people working on a client's affairs across an office, you have to be able to provide each of them with reliable access to complete information on the engagement, and this just isn't possible in a paper-based environment." Meanwhile, the firm as a whole was unable to ensure consistent regulatory compliance and disaster recovery planning for content scattered across disparate physical and electronic stores.

The solution was clear: to improve its professionals' ability to find, manage, and govern information, Tait Walker began a project to gather complete client content in a centralized electronic repository and make it available firm-wide. To power its paperless initiative, the firm chose Interwoven WorkSite. "WorkSite's intuitive design made it very easy to find and use client information, while providing the full range of functionality we needed to organize and manage content of all kinds," says Mulholland.

*"Interwoven WorkSite enables our professionals to find information more easily and efficiently, while helping our firm govern client information more effectively. Interwoven's size, resources, and commitment to our market give us confidence that their solutions will continue to evolve to meet our emerging needs."*

*David Mulholland, IT Manager, Tait Walker*

## Taking Client Information Online

Tait Walker implemented WorkSite with the assistance of Interwoven partner Advanced Professional Solutions (APS). Each client's information is now stored in a dedicated online client file, which contains subfolders for service lines such as taxation, business services, and corporate finance. Integration with Microsoft Outlook makes it possible for professionals to file and access e-mails as well as other types of content via the familiar Outlook interface, eliminating the inefficiencies and risks posed by silo'd e-mail content. In addition to work in progress, Tait Walker uses WorkSite to manage non-client information such as research and administrative reports for each service line, and provides online files for internal groups such as human resources, IT, and accounting.

Automated functionality and workflow drive further efficiency. When a new client is added to the firm's practice management system, the appropriate folder structure is created automatically within the WorkSite repository. Users are informed when documents have been added to libraries, and receive alerts of changes to designated documents within WorkSite. Inbound postal mail is scanned into searchable PDFs, then saved into the appropriate online files; staff members are alerted via e-mail that new correspondence is available for review.

## Industry

- Accounting

## Challenges

- Paper files made information hard to find and cumbersome to access
- With no definitive, centralized repository for complete client information, the firm faced difficulties with compliance and disaster recovery planning
- E-mails weren't being reliably captured and made available across the firm

## Benefits of Using Interwoven:

- Centralized, paperless information management simplifies governance and reduces risk
- Work papers and other documents including e-mails and scanned files are organized by Client and Engagement, and are accessible firm-wide anywhere at anytime
- The ongoing elimination of paper storage has freed enough office space for a staff kitchen



*Tait Walker is a leading U.K.-based firm of independent chartered accountants. Founded in 1937, the firm includes 10 partners and 126 team members.*

## Solution

### Going Paperless with Interwoven

Interwoven WorkSite powers content management for Tait Walker. Integrations with the firm's practice management system automate the generation of online client files as engagements are initiated, providing professionals with a single environment to store and access complete engagement content, including e-mail. Inbound postal mail is scanned to PDF, then made available electronically within WorkSite. In addition to work in progress, the solution is used to manage content firm-wide in areas such as IT, human resource, and accounts payable, which routes invoice approval through WorkSite workflow. Automated metadata assignment simplifies filing, and metadata and full-text search speed document retrieval and aid productivity and responsiveness.

### Accessing Engagement Content Quickly and Easily Firm-Wide

For Tait Walker's professionals, information has never been easier to find. In addition to browsing by online file, users can perform keyword and full-text searches across the entire repository. Automated profiling ensures that each item is categorized correctly, making lost or mis-filed content a thing of the past. "WorkSite is a huge time-saver," reports Mulholland. "There's no need to hunt things down in the file room; both filing and retrieving information are faster, and all those time savings really add up."

### Managing Risk through Improved Governance

WorkSite's centralized repository gives Tait Walker the control it needed to manage risk more effectively. Says Mulholland, "If someone is performing due diligence on a client, we know everything will be kept together in a single client file—there won't be any surprises from overlooked or missing content. WorkSite's e-mail management capabilities eliminate the need for a separate archiving system, putting us in a better position for regulatory compliance." The solution also plays a vital role in disaster recovery planning: "When you write a DR plan, you don't want to have to deal with a room full of paper files. Now we have a backup of everything we've ever done, so anything from a single document to the entire repository can be restored. That's a huge benefit."

### Reducing On-Site Storage Requirements

In addition to freeing its professionals from frequent trips to the file room, Tait Walker's WorkSite implementation has freed the file room itself for more productive uses. With 3,500 paper files now retired, the room has been reconfigured as a staff kitchen. As other legacy paper filing systems for account files and tax return files are digitized, the firm will recapture even more real estate.

### Extending the Benefits of Paperless Information

With WorkSite up and running—"The system is self-managing and highly robust," Mulholland reports—the firm is now turning its attention to expanding its capabilities. "Building client portals onto WorkSite is a logical extension of our investment, and would be an enormous competitive differentiator," says Mulholland, who hopes to complete the project in the coming year. Interwoven Universal Search is also under consideration as a way to help users manage not only documents, but the information they contain, in the context of firm-wide knowledge management. As the firm deepens its leverage of the latest paperless technologies, Interwoven's full solution set will provide the best-of-breed technologies it needs to achieve its objectives. Says Mulholland, "Interwoven's size, resources, and commitment to our market give us confidence that their solutions will continue to evolve to meet our emerging needs."

### About APS

Since inception in 1991, APS has been a relationship and service based organisation that moulds business process software around the individual business requirements of each of our clients. Our clients include a broad range of firms from the largest members of the Big 4 and their consulting cousins to mid-size and much smaller firms. For more information, visit [www.aps-advance.com](http://www.aps-advance.com)

### About Interwoven

Interwoven is a global leader in content management solutions. Interwoven's software and services enable organizations to effectively leverage content to drive business growth by improving the customer experience, increasing collaboration, and streamlining business processes in dynamic environments.

Interwoven, Inc.  
160 East Tasman Drive  
San Jose, CA 95134 USA  
(408) 774-2000

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