

Case Study: Aronson LLC

# SUCCESS STORY



## COMPANY PROFILE

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Aronson LLC provides assurance, tax and consulting solutions to individuals and businesses in industries such as construction and real estate, technology, government contracting, professional services and non-profit. Throughout its 60-year history, the Rockville, Maryland-based firm has been committed to expanding its service offerings and deepening its industry specialties to better meet the needs of its clients, people and community.

## CHALLENGE

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With the shift from paper-based records to electronic records, Aronson was finding it difficult to manage engagement data effectively. With paper-based records, it was easy to develop a filing and retention scheme that was executed by the operations team. However, electronic records required a more streamlined filing system to save the team time.

It was also proving difficult to get rid of older files that were no longer needed. A retention policy was in place, but an automated method for purging those older files wasn't.

With Aronson's growing client base, and the increase in numbers of files to track and access, Aronson sought to find a better solution.

The firm's forward-looking philosophy led them to realize something had to change.

"We were experiencing tremendous growth, and our systems could no longer keep up," said Laura Silva, Applications Project Manager at Aronson.

This situation prompted the firm to seek out a solution that could help put it back in control of its data and add greater efficiency to its operations.

A large circular graphic on the right side of the page. It features a blue sky with white clouds in the background. In the foreground, a hiker with a backpack and a trekking pole stands on a grassy mountain peak, looking out over a valley. The quote is overlaid on the sky portion of the circle.

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## SOLUTION

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As a CaseWare Working Papers user for more than 20 years, Aronson has long benefited from the solution's intelligent reporting, seamless file importing and exporting and many other features that have helped streamline its client engagements. When CaseWare Cloud became available, it was clear that this hybrid solution would help them rein in their disparate data. This stemmed from their bedrock belief that cloud computing was the way of the future.

"I believe in the use of cloud and Software as a Service (SaaS) products. They give you a greater scale of reliability and security," said Azunna Anyanwu, Aronson's Director of Information Technology.

Adopting a hybrid solution has allowed Aronson to integrate their long-standing Working Papers deployment with CaseWare Cloud products. This means that they can still enjoy the familiarity of their Working Papers environment while integrating the advancements and accessibility that come with the cloud.

Concurrent with their move to the cloud, Aronson adopted SmartSync, CaseWare's file synchronization system that lets team members collaborate on client files simultaneously. As one user updates a document, those changes synchronize instantly with every other colleague who is working in the file, and vice-versa.

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## RESULTS

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Adopting CaseWare Cloud allowed Aronson to store their files in a more consistent, structured format, and apply a consistent naming convention to each file. Now, employees can quickly find what they're looking for, saving time and adding efficiency. This also provides the peace of mind that comes with knowing exactly where files are and being able to produce them when necessary.

Previously, on their shared network server where everything was stored, "it was a bit of a wild west," said Anyanwu, due to the ability of any user to create folders as they saw fit. "So some people would make them under a client number, others would not. With the new cloud storage system, there is a more limited way that files can be stored and it's very consistent."

SmartSync's simultaneous file collaboration and synchronization functionality has eliminated previous issues Aronson had with copies of files not syncing. "It just automatically creates the sync on your local drive when you open a file and updates to the parent file in the cloud. It's great," said Anyanwu.

The cloud features have proven to be user-friendly, as indicated by the lack of calls for help from staff members who now use them. Initially, there were some questions around the general way in which the cloud process operated, but, as Anyanwu notes, "those questions tapered off as users learned how it worked. So I think that's one of the testaments to the hybrid nature of the CaseWare product and platform."



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## FUTURE LOOK

To build on their move to the cloud, Aronson is also evaluating OnPoint Collaborate, CaseWare's app for facilitating smooth and organized communication with clients. The solution eliminates the administrative challenges involved in gathering information from clients, and houses it in one central location with accessibility for all team members.

Committing to the cloud offers Aronson new opportunities to better serve their clients, thanks to the greater scale of efficiency the platform brings. Now, they are on the same footing as other larger competitors, said Anyanwu. "I see the cloud as the great equalizer. The big companies and us are all on the same platform, and now we all have the same capabilities as a result of this pooled investment."

Learn more about how CaseWare's cloud and hybrid solutions can help your accounting firm make the move to improved file management and greater efficiency.

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