



Winning with HR Technology:

How Baker Tilly continues to grow Client Accounting Services (CAS) & deepen their advisory role.

Advancements in technology can often result in society and economy-wide effects that directly impact not only how we live our lives, but the way we conduct business. Just ask Baker Tilly—the accounting profession is no exception. They understand that client needs inevitably change and the expectations of the types of service an accounting firm offers will be challenged. Wade Huseth, partner, and Matt Soderman, manager, examine the effects of the changing landscape and how ADP® helps Baker Tilly stay ahead of trends.

More advisory services

Wade explained the realization of how outside influences require a change from a more traditional approach. “Due to the rapid pace of changing technology, our clients expectations on how we can help them has evolved from a purely compliance driven focus—while still needing those services—to an expanded advisory role.” However, determining the parameters of that role proved to be wide reaching.

“Advisory can be just about anything,” he recalled. “From helping automate their processes, to cyber and security risks. Anything that affects clients due to technology and the pace of change in that area.”

With locations all over the world, Baker Tilly’s willingness to embrace change demonstrates a clear understanding that, as client needs evolve, it is necessary to adapt quickly and provide current services to remain aligned with client requirements.



Wade Huseth
Partner and CPA



Matt Soderman
Manager and CPA

Name	Baker Tilly
Industry	Accounting
Established	1931
Employees	3,150
Headquarters	Chicago, Illinois
Website	bakertilly.com



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Wade Huseth
Partner and CPA

Increasing reliance on technology

“Historically, the accounting profession has been slow to change. Technology continues to push forward and has put us in a position where we have to respond to different types of questions immediately,” Matt observed. “Clients are looking to their accountant for more than tax returns, audits or financial statements. They want to work in the cloud and are increasingly requesting more real time data, looking to us to solve real world, real business problems for them. Part of the reason we work with ADP was because of their ability to work with us in the cloud and provide real time solutions.”

Being able to rely on the accuracy of the reporting being provided by ADP is essential in helping maintain a competitive advantage.

“We work a lot with clients in the cloud through programs like QuickBooks or Sage Intacct. ADP allows us the ability to smoothly connect with those two databases,” said Matt.

“We can advise on the go rather than waiting, having to review and reconcile information later. We have confidence in the data they’re getting from ADP. Whether it’s payroll data or compensation data, we already know that we can trust the accuracy of the reporting.”

Strategy to satisfy client expectations

As the accounting industry works vigorously to anticipate changing trends, a vital part of Baker Tilly’s long term strategy is remaining focused on industry specialization. “Every industry we are supporting is going to face their own pace of change and their own unique challenges because of landscape shifts,” said Wade. “If we are not deep into that industry, we run the risk of missing something that could help our clients, or worse—put them at risk. We strive to be strong business advisors, not just accountants who crunch numbers. There is tremendous value in keeping track of, and staying in compliance with, the rules, but there’s also exceptional value in helping create solutions to new problems that clients face because of the speed of change in their respective industry.”

With the requirement of change, it was not a matter of whether adapting was necessary, but how it would be accomplished at Baker Tilly. Implementing a clear strategy would require onboarding staff with expanding competencies. Wade recalled this accomplishment: “We began by hiring a different skill set than we used to, meaning more technology skills and different backgrounds than just purely accountant based. Our CPA’s and accountants continue to do accounting, compliance, number crunching, audits and tax returns, but then we’re supplementing that with industry specialists and technology specialists or any type of advisory specialists in order to meet the needs that our clients have.”



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Breadth and benefits of ADP solutions

When considering the options to help achieve measurable results for their clients, that path required a strategic lens to determine the most effective means. "When leadership came together to outline what we wanted to provide our clients in the area of Client Accounting Services, or CAS, we considered everything from general ledger to payroll needs," explained Wade. "RUN Powered by ADP® Payroll for Partners proved the perfect platform for us to use in our foundation of client data. It is essentially the gateway to our advisory practice, and without that in place we would not have the knowledge, the trust and the insights that we need to best service our clients."

Also known as RUN Wholesale, RUN Powered by ADP Payroll for Partners is ADP's white-label payroll and HR cloud solution for accounting professionals. Thousands of accounting firms, from small tax preparers to many Top 100 firms, rely on RUN Wholesale to efficiently and securely process payrolls and help firms address essential HR needs for their small business clients.

"RUN Payroll for Partners has provided so much more than just an avenue to automate our payroll process," adds Matt. "It has allowed us to minimize the personnel needed for payroll tasks and reposition a number of our staff into more valuable projects. It's these projects that have allowed us to work with our clients in a more real-time environment, identifying gaps and reducing risks to their business."

Leveraging analytics, benchmarking and talent management

Utilizing big data to obtain valuable insight from client data is another essential ingredient that Baker Tilly derives from its partnership with ADP, noting the practice of using Accountant ConnectSM. "It's a great resource for accessing research and gathering relevant data quickly," said Matt. That swift availability is imperative in achieving the level of service its clients require as echoed by Wade, "Accountant Connect provides us a way to see—quickly and easily—what's happening with our clients and their payroll. And that's important to our business, so that we can get on to the next issue that our clients are facing, and not waste time looking for the information we need. It's a single source that we can go to, and get everything that we need very efficiently."

With low unemployment rates and more opportunities presented to potential employees, many companies are faced with questions around how to compensate employees to bolster recruitment and retention efforts. "Compensation benchmarking is huge," said Matt. "Our clients have a tremendous amount of interest in how they compare against competitors or within their specific industry. Accountant Connect allows us to marry financial data with performance indication data as it gathers that data from different regions and industries. Having those tools available to us is so powerful."

Compensation Benchmarking, powered by ADP DataCloud, was recently added as an enhanced feature inside Accountant Connect and provides real,

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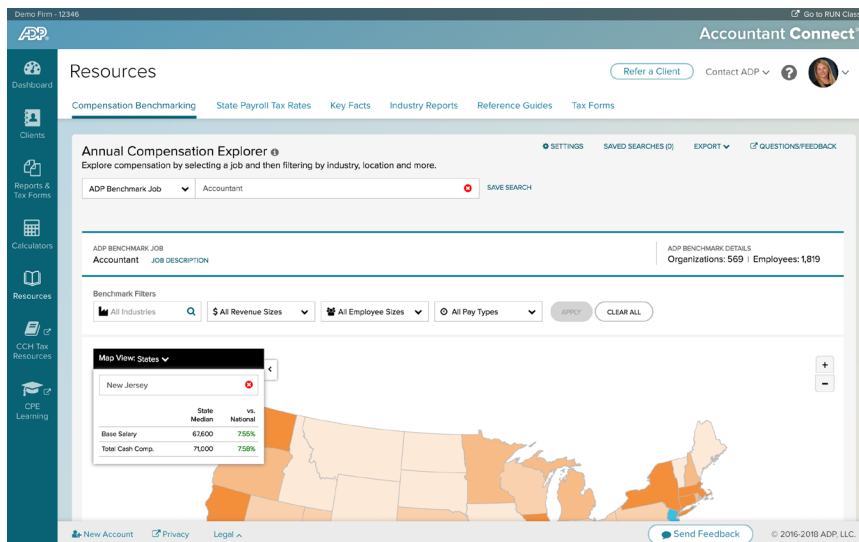
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Manager and CPA

up-to-date insight into market pay for jobs in the U.S. based on aggregated payroll data from ADP's vast payroll base of nearly 30 million people. Compensation Benchmarking is just one part of the larger ADP DataCloud—a powerful, intelligent set of data analysis tools designed to help make workforce analytics and big data work hard for accounting professionals and their clients.

Additionally, leveraging a talent strategy and understanding what factors drive employees is tremendously important. “Our clients are constantly looking for other solutions outside of general payroll,” indicated Matt. “A lot of times, we'll work with clients and help them streamline talent management and recruiting functions.”

“Having access to these solutions is really invaluable to us as their advisors,” adds Wade. “Our clients look to us for guidance and direction, and ADP helps put our fingers on information that has allowed us to produce viable solutions, save our clients time and at the same time increase our revenue. That's an all-around win for everyone involved.”



Finding success in the right partnership

Wade believes that the successes Baker Tilly has enjoyed can be experienced by any number of firms, large or small. “An accounting firm of any size can get value out of a relationship with ADP,” he explained. “The depth of ADP products and services, coupled with their understanding of client needs, no matter the size of the company, make it a perfect partner to address almost any issues their clients are facing and that can only help you look good to them as well.”

“It's not a 'one size fits all' world, so it's not a 'one size fits all' approach. ADP understands this,” he adds. “We recommend ADP because they provide us the ability to serve very small clients and very large clients on the different platforms they can offer based on the specific needs each client may have.”

