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BUSINESS INTELLIGENCE

Baker Tilly
Financial Services
TimeXtender Data Integration.

# At A Glance:

## Solution Snapshot:

> Automated data access with data
  modeling and compliance tools.

> Quick and easy access to data
  source transactions.

## Benefits:

> Easily retrieve data sets for auditing
  and analysis purposes.

> Automated and documented
  data lineage.

> Optimised for Microsoft
  Applications such as Azure -
  boosting the scalability and
  flexibility of Baker Tilly's
  environment.

**CASE STUDY**

# Baker Tilly creates Data Factory with TimeXtender.

Baker Tilly is an accountancy and tax consultancy firm offering a broad range of services from statutory audits of annual accounts to VAT consultancy and from employment law to IT advice. The firm primarily focuses on the public sector, healthcare and larger SMEs. The firm's four lines of business -Auditing, Tax Consulting, SME Accountancy & Consulting, and Advisory- generate a combined annual turnover of around 100 million euros.

## STANDING OUT FROM THE CROWD

Baker Tilly's mission is to provide predictably consistent quality as effectively as possible. To boost the quality and relevance of its services, the firm launched a project in 2018 to optimize data use across the entire organisation.

"Many of our end products are the same regardless of who creates them, such as an auditor's report or an audit opinion. The difference can be found in the way you create these end products and the value that you add for the client during the process. This requires smart operations and smart use of tools. We were convinced that by optimally incorporating the latest technological developments in the field of big data and analysis, we could substantially improve our working methods and operations."
IT Advisory Manager, Baker Tilly

"**TimeXtender enables every internal and external data source to be connected, catalogued, modeled, transferred and documented for the purposes of analysis and AI.**"

IT Advisory Manager,
Baker Tilly

## UNSTRUCTURED DATA PROCESSES

The firm collects massive quantities of data from its clients during the course of its auditing, control, accounting and consultancy services. "With the old system, this data would often be entered four or five times by the various lines of business and offices. There was no standardisation, so everyone started from scratch every time. Data security was also patchy, as it was stored across various drives and sent via email. And these are just a few of the many internal issues that we had. Furthermore, our clients increasingly expect more from us: they want us to make it quick and efficient to provide their data and expect us to use this data smartly and securely. For all of these reasons, it was vital that we improved our data management." - IT Advisory Manager, Baker Tilly

## FROM DASHBOARDS TO PROFESSIONAL DATA MANAGEMENT

Baker Tilly started by rolling out a data environment using Qlik Sense. IT Advisory Manager at Baker Tilly explains:
"Our end users were very enthusiastic, although monitoring was an issue. The data is untraceable, so if somebody wanted to know the source of a particular transaction, we would have to search for it manually. Furthermore, the performance was suboptimal as we had to load all of the data each and every time rather than just the amended records. Clearly, it was high time to take the next step and roll out a platform that would automate everything to do with data and substantially improve data management."

This decision led to the set-up of the Data Factory, with Baker Tilly selecting the TimeXtender data management platform:
"timeXtender is an integrated data management platform that allows rapid conversion of data into practical information. TimeXtender automates data access and provides modeling and compliance tools. In short, TimeXtender enables every internal and external data source to be connected, catalogued, modeled, transferred and documented for the purposes of analysis and AI." - IT Advisory Manager, Baker Tilly

## FULLY AUTOMATED PROVISION AND PRESENTATION OF DATA

The roll-out of TimeXtender was flawlessly smooth. Within a week, Baker Tilly had converted the entire data environment from Qlik to TimeXtender with Qlik as an endpoint. The IT Advisory Manager at Baker Tilly explains:
"We named the new environment Data Factory. After the first week, we refined the environment and ensured that virtually no human activity is involved in the provision of data and presentation of data via dashboards. The data-provision process is now either conducted via RPA we trigger it using scripts."

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> " TimeXtender is optimised for Microsoft Applications such as Azure, which greatly boosts the scalability and flexibility of our environment."
>
> IT Advisory Manager, Baker Tilly

## BETTER SERVICE IN LESS TIME

This automated system gives Baker Tilly's staff powerful tools to retrieve data sets for auditing and analysis purposes.

"TimeXtender allows us to combine the various data sets into high-quality information for our auditors,." Baker Tilly's IT Advisory Manager explains, "TimeXtender also handles validations, which are vital for auditing and control services, as well as automating and documenting the data lineage, allowing us to see how the data has been processed. This information can be provided to supervisory bodies at the touch of a button, which saves our staff and clients a great deal of time and boosts the quality of our services. We can now do smarter things with our clients' data, which in turn allows us to give them better advice."

## FLEXIBLE AND SCALABLE

The next step for Baker Tilly is to duplicate the TimeXtender environment in the Netherlands and to create similar environments for international clients. Baker Tilly's IT Advisory Manager explains:

"Within our Dutch firm, we want to distinguish between data for our internal clients –i.e. our own organisation– and our external clients. We want to host our own data on the premises and our clients' data in the cloud via Microsoft Azure, and as TimeXtender works so well with Microsoft, this can be done with just a couple of clicks. The same convenience was clearly evident during the roll-out of this environment to our international offices. TimeXtender is so scalable that all we need to do is set up a single Microsoft Azure environment for our German and American colleagues, and when it comes to the endpoints we use, TimeXtender is equally scalable and flexible. We happened to select Qlik Sense, although with TimeXtender as a data estate, you can also select other endpoints such as Power BI. We also use an Excel endpoint to enable data enrichment."

## INVESTMENT PAYS FOR ITSELF IN WEEKS RATHER THAN MONTHS OR YEARS

"I would advise any small or medium-sized enterprise to investigate the benefits of using TimeXtender as a data management platform.

After all, as the volume of data that organisations have to handle increases - which it will undoubtedly continue to do in the future - aspects such as version management and data lineage will become increasingly vital for the purposes of compliance."
IT Advisory Manager, Baker Tilly

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## BUSINESS INTELLIGENCE

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We do this using our extensive expertise to deploy best in class BI and EPM solutions in an innovative and creative way to ensure clients to realise real business benefit.

Our specialist BI team built over the last few years is hand picked for their expertise in Business Intelligence and Enterprise Performance Management boasting numerous successful BI and EPM projects across a wide range of industries, TouchstoneBI is recognised as TimeXtender's leading UK partner.

We work with our clients on their journey from data discovery to visualisation ensuring that they measure what matters. We can then work to ensure that adoption is as wide as possible across the organisation, making available their most important KPIs anywhere, anytime and on any device.

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