



Customer Success Story: Ehrhardt Keefe Steiner & Hottman PC

Overview

Ehrhardt Keefe Steiner & Hottman PC (EKS&H) is the largest Colorado-based accounting and business advisory firm. Over the last decade, the firm has grown consistently at an unprecedented rate compared to other accounting and business advisory firms that serve Denver, Fort Collins, Boulder and surrounding markets throughout the Rocky Mountain region.

Challenge

Like many large accounting firms, EKS&H is extremely process driven. In order to support its entire organization, the firm wanted to streamline and automate a number of critical processes that touch many areas of its business. EKS&H wanted to deploy an enterprise-level solution rather than a technology geared just for the accounting vertical. This would enable the firm to meet its goal of using technology to automate processes in all areas of client service, as well as extend the benefits of automation to new client acquisition procedures and other administrative functions.

The firm needed a technology foundation that would act as a partner to assist with its enterprise-wide initiative and one that would also help it better serve clients and improve its ability to retrieve customer information and reports when needed.

EKS&H reviewed various business process management systems and determined that Metastorm BPM® was the best fit for its needs. Metastorm stood out due to its successful track record and proven success integrating and working with Interwoven, Microsoft Outlook, and SharePoint; its superior flexibility and rapid time to delivery compared to other products; and the ability of its common platform to be leveraged throughout the entire EKS&H organization.

Highlights

Business Services/ Accounting

Challenge:

- Quality Control process for tax return filings
- e-File Tax Return tracking
- Audit and Tax Close process

Customer Benefits & Results:

- Saved a significant amount of administrative time through automation
- Enabled accountability and quality control
- Lowered risk through increased visibility and accountability

Solution


Metastorm BPM was selected as the foundation to aid in creating streamlined, automated processes across the organization to help with the day-to-day activities of running a fast-paced accounting practice.

Using Metastorm BPM across three locations, EKS&H automated and streamlined a quality control process that tracks and manages the work being performed by the firm's central processing group before a tax return is filed. Also tying into this process, the firm automated the procedures for tracking all e-file tax returns with the IRS – a critical automation component for the firm, which expects to electronically file over 4,000 tax returns during the 2007 tax season.

Additional automation includes an audit and tax close process that helps the firm comply with SEC requirements. This process gives the firm a secure way of locking down files within mandated timeframes and also provides accountability not in place before Metastorm.

Results

The company realized immediate benefits from Metastorm BPM and reports that it already saved administrative time through its initial automation efforts. With a single point of entry, the firm also now has accountability and quality control by enabling anyone involved in a particular process to have complete visibility of its progress.



EKS&H reports it has gained knowledge and insight into its processes by viewing critical information in real-time – a capability that was not previously available. Now at the end of tax season, the firm will know where every item stands with real-time live data.

All in all, Metastorm has enabled EKS&H to deliver faster and more efficient processes while simultaneously enhancing customer service and lowering overall risk. The firm reports that Metastorm BPM has become very popular with its employees and expects that it will continue to be leveraged across the company for deploying new processes.

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