



**FI SLAVEN**  
GENERAL MANAGER

## William Buck Victoria

### Improving Client Service with Intapp Flow and Integrate

William Buck is a leading firm with Chartered Accounts and advisors with offices across Australia and New Zealand. Its Melbourne office, William Buck Victoria, works with a vast range of medium-sized businesses, large corporations, and high net worth individuals.

#### Continual Drive to Improve Client Service

William Buck Victoria lives its motto, "Changing Lives." This unique philosophy guides the firm to aspire to make a positive difference for clients, employees, and community. Recognising that clients would benefit from less reliance on paperwork, General Manager Fi Slaven and Lalitha Koya, IT Manager, drove an initiative to digitise processes to accelerate communications and improve client experience.

As it stood, many of the processes around client engagement and approvals were paper-based and slow. Koya explains, "For instance, the process for client engagement and approvals was much too slow. Some of our paperwork could take a few weeks to complete with internal approvals, mailing documents, and client signatures." Clients expected those processes, like the rest of their lives, to be entirely digital and mobile-enabled.

#### Continual Drive to Improve Client Service

William Buck Victoria started on this journey by using Intapp Integrate to connect NetDocuments and Reckon APS. From there, Intapp Flow and Intapp Integrate were deployed to address client engagement and client approval workflows. The goal was to eliminate those manual paper-based processes and make it easy for clients to engage William Buck Victoria for services.

Intapp Flow enabled the documents to be circulated for internal approval, and then for customer signoff. The workflows supported escalation, an audit trail, the ability to check the status or re-routing - something that was not possible with the paper-based processes.

Next, Intapp Flow replaced the mailing of materials to clients with secure electronic communication and e-signature capabilities enabled by DocuSign. This included support for mobile devices. The workflows also updated backend systems.

The ease of use of Intapp Flow was a top consideration for William Buck Victoria. With a small IT staff, William Buck Victoria did not need to be spending time writing code. Instead, Intapp's intuitive web interface enabled the IT team to create and modify workflows quickly.

William Buck Victoria selected Intapp in part due to a results-driven relationship. Koya states, "Intapp employees go the extra mile to deliver superior service. Whether it is product development, support, or customer success, Intapp treats us like a partner with a free flow of ideas."

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*"Intapp has been a key enabler for improving client service... Employees are spending more time with clients and less time shuffling papers."*

**FI SLAVEN, GENERAL MANAGER**

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## Executive Summary

**William Buck Victoria**, a leading firm of Chartered Accountants and advisors based in Melbourne, is using Intapp Flow and Intapp Integrate to digitise processes and enhance client service delivery.

### Challenge

- Paper-based client approval processes – involving mailing documents and collecting signatures – were too slow and did not meet the firm's high standards for client service
- Key business systems in the firm were running in parallel but were not integrated

### Results With Intapp

- Intapp Flow and Intapp Integrate have played a critical role in enabling the firm to digitise processes and automate client approval workflows
- Significant efficiency gains, reduction in operating costs, and enhanced client service
- Accelerated speed of business - tax processes that could take weeks now take less than a day
- Clients are now able to engage more easily with the firm for services
- Account teams have more time to spend with clients and have improved visibility into request status
- IT is now focused on delivering more business value with less coding and administration
- New capabilities as part of the automated workflows include escalation, re-rerouting of approvals and a robust audit trail



*"Intapp employees go the extra mile to deliver superior service... Intapp treats us like a partner with a free flow of ideas."*

LALITHA KOYA, IT MANAGER

## Business Impact of Intapp Flow

The Intapp Flow deployment delivered immediate value.

First off, William Buck Victoria saw a reduction in the amount of time it took to complete a process. Koya explains, "In some cases, it could take weeks to complete the tax process. Now in many cases, it is less than a day."

All processes leveraging Intapp Flow saw a similar reduction in cycle times. Clients also like the new way of engaging the firm using a web or mobile interface, as opposed to mailing or scanning documents. Coupled with this was more time to focus on the client.

On top of the client service aspects, the firm saw a reduction in hard costs along with employee efficiency gains. By moving to electronic documents, William Buck Victoria's costs for postage, courier services and printing are reduced dramatically.

The efficiency gains also applied to both IT and account teams. For the account teams, accessing the intuitive Intapp Flow interface makes it easier for them to complete critical client tasks. Not only that, they can check the current status of any processes.

Intapp Flow's ease of use for creating and modifying workflows enabled the IT teams to deliver more business value with less staff effort.