

AMELIO[™] CASE STUDY

CBIZ MHM, LLC Enhances Audit and Client Engagement Processes with Flexible, Automated Tool



About CBIZ MHM, LLC

CBIZ MHM, LLC (CBIZ) provides a wide range of accounting and business management services to assist both individuals and small to medium-sized businesses in meeting all of their diverse needs. Mayer Hoffman McCann P.C. (MHM), a nationally independently owned CPA firm, provides audit and financial reporting services. With more than 140 offices and 6,000 associates in major metropolitan and suburban cities throughout the US, CBIZ is a professional services company, providing a comprehensive range of business services, products and solutions that help its clients grow and succeed by better managing their finances, employees and technology. Together, CBIZ and MHM rank as one of the Top Ten accounting providers in the US.

THE CHALLENGE

CBIZ MHM, LLC offers a wide range of accounting and business management services. The Mayer Hoffman McCann P.C. (MHM) half of the company, a national independently owned CPA firm providing audit and financial reporting services, was seeking a new technology platform that would streamline its audit process and incorporate the company's own audit methodology.

THE SOLUTION

MHM had been using both off-the-shelf technology and a manual Excel-based system and had identified five features that were critical in a new system:

1. It had to be logic-driven to make audits more thorough and efficient.
2. It had to allow for information to be centrally managed.
3. It had to be flexible enough to incorporate CBIZ's own methodology — off-the-shelf methodology was too general.
4. It had to include reporting capabilities to allow for greater management and risk-management control.
5. It had to be web-based.

Among the products MHM considered were PPC's SMART PracticeAids, CaseWare's CaseView and Amelio, a process-management platform for

automating and managing compliance-related forms and checklists. Amelio is both highly customizable and logic-driven — the user determines both the questions and the rules — and was the only solution that fulfilled four of the firm's five requirements: logic-driven, centrally managed, accommodates MHM's proprietary methodology, and is web-based.

MHM was able to work with HKMP Technologies to build the fifth requirement — reporting functionality — into Amelio. MHM staff required only a simple user guide and virtually no training to begin using Amelio, and employees easily adapted to the new system.

While MHM was seeking a tool like Amelio for general auditing functions, the CBIZ Financial Services arm of the company was working to develop software for the company's client engagement and acceptance process. After seeing how Amelio would benefit MHM, the CBIZ team recognized that Amelio offered all the features it was trying to build in a proprietary tool, with the exception of workflow. The workflow functionality was crucial for CBIZ's sophisticated client/engagement acceptance. The CBIZ team consulted with HKMP Technologies to add workflow capabilities to Amelio then adopted the platform for managing the client engagement piece of the business.

With Amelio, CBIZ users can take advantage of workflow features such as role-based task assignments, notifications, and due dates and milestones for each project. CBIZ now uses Amelio not only for client acceptance, but also to approve changes to client accounts. Those changes feed into several integrated processes,

including the company's time and billing software and Salesforce.

THE RESULTS

2014 marks CBIZ MHM's third busy season using Amelio. Currently, 800 auditors are using Amelio, and the firm is nearing 1,500 users for client acceptance. CBIZ MHM saw a 7 percent savings in efficiency the first year and an 8 percent savings the second year, which it attributes to the combined use of Amelio and its own audit methodology.

Amelio has enabled MHM to establish a consistent audit, review and compilation methodology across its nationwide practice and among all of the industries that its 6,000 associates serve. This, in turn, has helped establish best practices throughout each of the company's 140 offices and has ensured that its services are compliant.

In addition, CBIZ MHM has benefitted from several user functionality enhancements as the HKMP Technologies team

strives to continuously add to and upgrade Amelio's capabilities. For example, one of MHM's favorite features is the ability to see missing sign-offs and uncompleted steps on the left side of the screen. And Amelio's integration with CaseWare has improved efficiencies in MHM's attest work.

THE OPPORTUNITIES

Looking forward, CBIZ MHM plans to utilize Amelio to gain an additional understanding of all the specific industry audits performed and complex accounting issues encountered at each of its local offices. The company also hopes to use Amelio to establish a national database and ensure a more cohesive national accounting practice. For CBIZ MHM, Amelio started out as the right solution for its general audit practice and has turned out to be a powerful tool to address its wide-ranging and ever-changing needs. •



About AMELIO

From addressing complex internal and external governance requirements to managing an array of routine business processes, organizations across industries increasingly rely on forms and checklists to manage compliance. Amelio is a powerful yet flexible platform for managing compliance and business processes.

Designed for speed, efficiency and accountability, Amelio makes it easy to streamline, automate and manage compliance forms, checklists and processes to each organization's specific needs. With robust workflow capabilities to ensure that the right people are taking the right actions at the right time, Amelio can add significant value to virtually any compliance or form-driven business process in any industry.

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