



Left to right: David E. Cooke, Peter E. Fleming, Peter J. Mullen, David M. Wilke

## Team Players

At Wilke & Associates, CPAs, the focus on teamwork extends to every corner of the business — up to and including the tools they use to serve their clientele.

### Meet the firm

For **Wilke & Associates, CPAs**, it's all about the teamwork. From the newest employee straight on through to the partners, everything is done with the good of the team (which includes the firm's clients) in mind.

That's why Wilke & Associates has always made business decisions with an eye to easier sharing of resources, whether it involves processes and procedures or software. And if the two can be combined for easier collaboration, so much the better — which is what brought managing partner David Wilke to the Practice CS management system and Thomson Reuters in 1998, when Wilke & Associates opened its doors.

### A firm foundation

"We've developed our process and procedures around Practice CS," says Wilke. "Team members use the client dashboard on a daily basis. It tracks our history with the client, current work in process, any outstanding receivables, and of course all the contact information. We can adjust it to the partner who's the biller and all other information that's critical to us — where the client came from, where they were referred from, and who is working on the client.

"We also use Practice CS for all of our salaries, wages, and compensation. Team members are paid hourly, they enter their time, and we invoice our clients and track all of our jobs by the hour. Our entire firm is built around Practice CS."

When asked if there's a feature of Practice CS that he or his staff couldn't live without, his choice is not a surprise. "The firm and client dashboards. We use them to provide reports to team members on a regular basis so they can keep up with larger clients that require significant attention, and so they're reminded about their tasks and duties. We've been trying to pair that with [the document management system] GoFileRoom, and that's worked pretty well, too."

What would Wilke tell a peer who's considering Practice CS? "This is the software we trust, and it's not let us down for 20 years. I'm sure there are a lot of other competing products, but we haven't really considered any of them because when you have something that works — and works very well, gets you what you need, and how you need it, that's good enough for us."



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### Firm

#### Wilke & Associates, CPAs

David M. Wilke, Managing Partner, CPA, MBA

David E. Cooke, Partner, CPA

Peter J. Mullen, Partner, CPA

Peter E. Fleming, Partner, CPA, CFE

### About

Based in Pittsburgh, Pennsylvania, Wilke & Associates, CPAs was established in 1998. Its three offices and 45 employees offer consulting and advisory, tax and compliance, and audit attest services to private and public companies at all stages of growth.

### Website

You can learn more about the firm and the services they offer at [wilkecpa.com](http://wilkecpa.com).

### Thomson Reuters software

Wilke & Associates uses Practice CS®, UltraTax CS®, GoFileRoom®, and Virtual Office CS®.



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### Share and share alike

Another application Wilke & Associates would have a hard time living without is UltraTax CS and its automatic data sharing capabilities.

“We’ve used UltraTax CS for 20 years, as well,” Wilke says. “When our clients and small business owners have changes in their lives — whether they move, divorce, or God forbid, pass away — it creates a potentially embarrassing situation if one of us in the company knows about it but our data does not. When you have software that can connect and let you know of conflicts, it can save a client and save us from embarrassment as a company. Those changes have happened weekly, monthly, regularly for the last 20 years, and if we change something in Practice CS, for example, someone who’s preparing a tax return in UltraTax CS will be able to address it.”

What are Wilke’s thoughts on the UltraTax CS diagnostics? “Our partners and technical reviewers are adamant about diagnostics being addressed and cleared. [In UltraTax CS] there are a lot of very key elements about how the Internal Revenue Service would process a return that are useful. From all the electronic glitches that could occur — which are prevented with the diagnostics — to some of the technical matters with regard to certain forms, it’s very helpful.

And what does Wilke think of the unique multi-monitor capabilities of UltraTax CS? “We have full capabilities for all of our staff through Virtual Office CS so they can work remotely from anywhere they choose. But because of our three-monitor setup in the office, many people just prefer coming to the office and working at their desk because of the flexibility of the workstation setup. It makes them more efficient and helps keep our client cost down.”

Speaking of Virtual Office CS, how effective has that capability for staff to log in anytime and anywhere been for the Wilke & Associates team?

“We were one of the early adopters. When we were quoted a high price for new servers, we elected to go with Virtual Office CS, even though it was in the initial stages. We feel safe and secure with our client data, and we feel we’re very efficient because we can go to a client’s office and have access to all our information. It’s also allowed us to go with much less paper. We don’t have paper files for tax returns, audits, or financial reporting anymore.”



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### The new kid on the block

Recently, the Wilke & Associates team has been getting used to GoFileRoom, the web-based document management software from Thomson Reuters. The platform dramatically increased their productivity, efficiency, and turnaround time during tax season, with 30% more returns filed in the last week of tax season than the firm originally projected. The tax preparation and administrative teams also reported producing more returns in less time compared to the previous year — with significantly less stress.

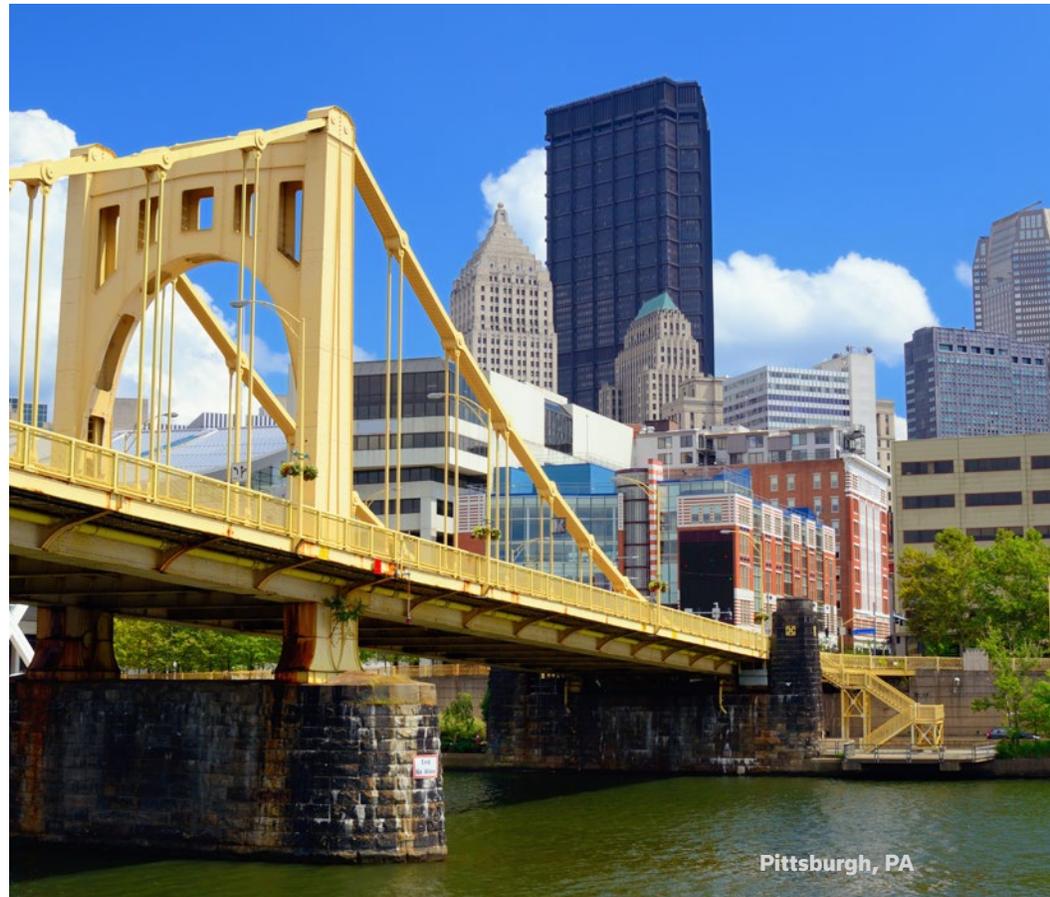
Looking back, how does Wilke view the change?

“We have a lot of tenure with our staff and team members,” he says. “A lot of them have been here for 15 or 20 years. When you make a change like that, to go from paper to no paper and using GoFileRoom with tax processing, it wasn’t an easy change for some people. However, after a year they understand how valuable it is. I’d say we couldn’t live without it now. No one in the firm — even those who are so ingrained in doing their job the old-fashioned way — desires the old approach at all. They wouldn’t get rid of GoFileRoom for anything.”

How has the move from a traditional folder structure into more of a search-based database structure been received?

“The workflow and search functions; they are wonderful!” Wilke declares. “You can’t live without it. The only thing that’s annoying to our professionals is that we don’t have everything older scanned and logged perfectly into GoFileRoom. The frustration is, ‘Why didn’t we do it 10 years ago?’ We have an old file room in our building, and it’s not full. There’s less and less information being stored there. We’ll probably do away with our entire file room at some point in the next five years. That’s valuable space. We even have offsite storage, and that will be eliminated too.

“[GoFileRoom] feels safe and secure. One of the greatest things is being able to go to a client’s office, do the document search right there in front of them, and pull up anything you want to



show them — fast.”

Wilke is also pleased that the significant time savings has allowed them to invest in strengthening their managers’ knowledge to better serve their clients. To that end, the firm has created technical teams that concentrate on new developments in the areas of international, corporate, and individual tax, fraud and forensics, and software and technology, just to name a few topics. The collaborative environment of GoFileRoom lets managers work together to provide valuable solutions to their clients — and it allows more time for tax planning, which helps increase their capital.



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Pittsburgh, PA

### Summing it all up

When asked if there's anything else he'd like to say about his experience with the firm's Thomson Reuters products, Wilke mentions a somewhat unexpected benefit with which many business leaders will identify is attracting new talent.

"One of our bigger problems in growing the firm has been staff retention and then recruitment. In the past we've had some turnover. Over the last year, that's changed dramatically for the better. Since we've added GoFileRoom, we've had no unexpected turnover. We've had some people leave and change jobs, but it's been more of an expectation, or a transition plan, than unexpected. Our unexpected turnover has been very close to zero.

"New people coming in, when they use GoFileRoom and add that to Virtual Office CS and see the way everything flows — well, our training and onboarding has elevated to a point where most people, when they walk out after their first day, say to themselves, 'Wow, this is pretty good.' Very few people have come in and said, 'Well, you don't have this or that.' We're working on all kinds of fun things with technology, and feel confident doing it with Virtual Office CS, and GoFileRoom, and of course Practice CS.

### So what does the future hold for the Wilke & Associates team?

"We're ready for more growth, and we're ready for more technology," Wilke says. "As we continue to look for ways to exceed client expectations through problem solving and service, we want to be on the cutting edge of technology and make the best use of the 'the next big thing.' That's why we'll be attending the SYNERGY conference in November and looking for Jon Baron's predictions, and all his business plans he likes to share with everybody. It's great!"

Almost as great as it is to be part of a forward-thinking team like Wilke & Associates, CPAs.



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