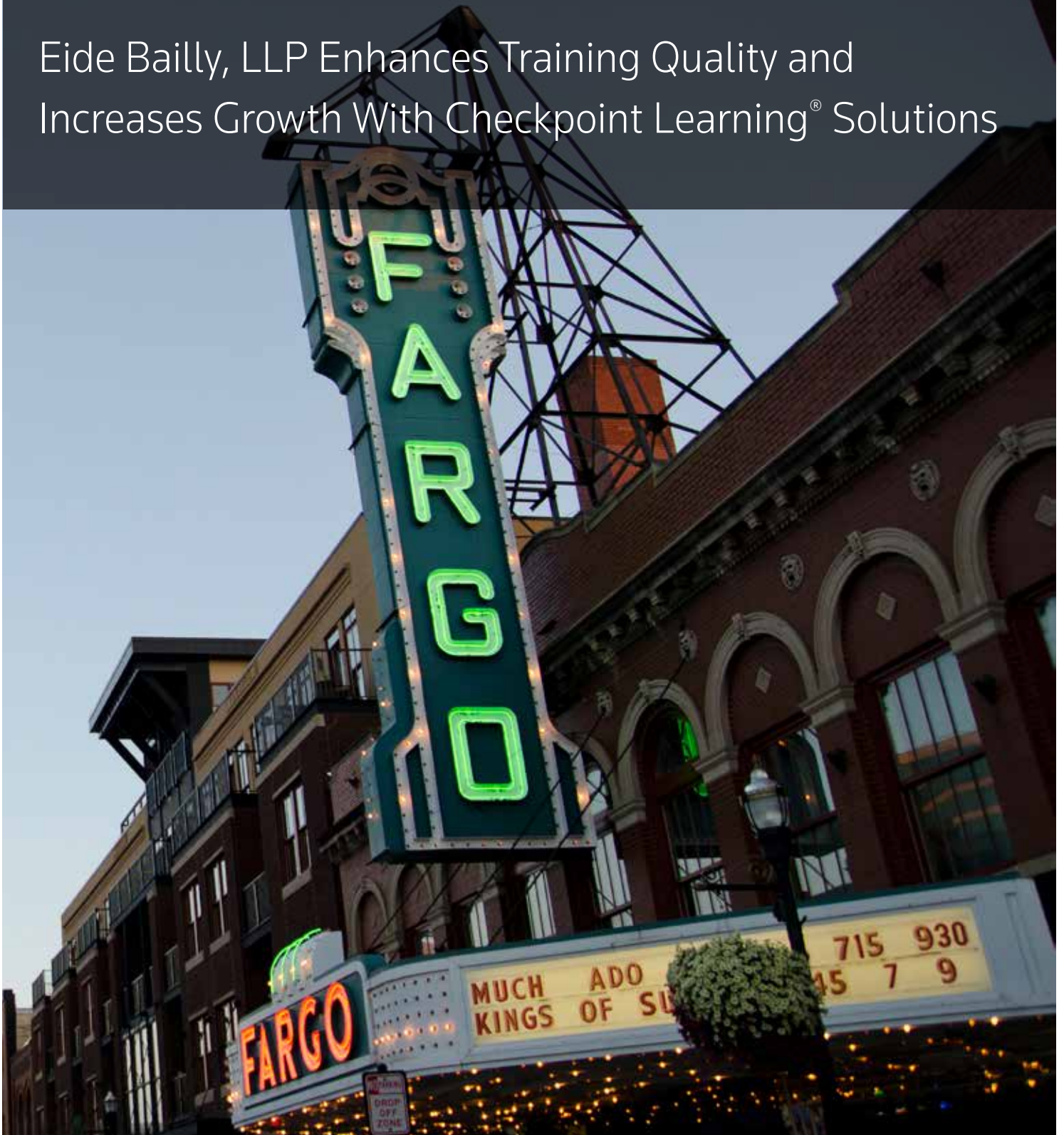


Eide Bailly, LLP Enhances Training Quality and
Increases Growth With Checkpoint Learning® Solutions



Fargo, North Dakota

Eide Bailly Enhances Training Quality and Increases Growth With Checkpoint Learning Solutions

Discover how Eide Bailly increased productivity, improved training accessibility and complemented their formal learning plan with Thomson Reuters Checkpoint Learning solutions in a way that not only enhanced the firm's training program but also helped to spur growth.

Firm Background

Based in Fargo, North Dakota, Eide Bailly, is a regional certified public accounting and business advisory firm. Since its establishment in 1917, it has undergone westward expansion and today operates 29 offices in 13 states. The firm is largely focused on serving small to mid-sized closely held businesses and generates about \$254 million in firm-wide revenue. With a staff of roughly 1,700 associates, Eide Bailly offers its clients a broad mix of services, including accounting services, audit and assurance, cyber security, health care reform, outsourced services, technology consulting and wealth management.

Nurturing a Collaborative Culture Through Quality Education

Eide Bailly firmly believes that culture is the foundation of success. Building talent and cultivating a collaborative culture, however, takes a great deal of work and commitment. Looking to foster a "One Firm" concept by providing consistent messaging and quality education to its staff and partners, Eide Bailly sought the development of a formal learning plan.

Trusted Learning Solutions

Looking to ramp up productivity as a component of their culture and complement their formal learning plan, Eide Bailly partnered with AuditWatch to assist in the implementation of an audit efficiency initiative that was rolled out with customized training and programs.

Today the firm has full learning curriculums for a majority of their different service areas — ranging from onboarding to becoming a partner. There are different levels of content from core technical skills early on in an auditor's career to non-technical, leadership, firm vision and strategy as one progresses through the firm.

Eide Bailly has also developed a competency model. Each role within the firm has a unique competency model with illustrated behaviors that are defined and outlined. Training and learning geared toward those competencies is provided.

Charged with managing and leading the training initiatives within the firm is an eight-person team largely composed of professionals who have expertise in the area of adult learning. Team members include a non-technical training manager, logistics manager, webcast coordinator, e-learning specialist and LMS coordinator.

To address the accessibility of learning, the firm leverages Checkpoint Learning online courses and TaxWatch University, a multi-level tax staff training program.

In addition, Eide Bailly implemented the eLogic Learning cloud-based learning platform, which integrates with the LearnLive compliance tool — part of the Thomson Reuters Checkpoint Learning portfolio.

"The LearnLive compliance tool has provided up-to-date information on licensure to its staff regarding their individual licenses," said Jason McKeever, Director of Training and Development at Eide Bailly.



The Results

The firm's longstanding focus on providing opportunities for staff and clients that are unique and of the highest quality is not going unnoticed. In its 2016 – 2017 Year in Review, the firm exceeded its growth goal of 15 percent. This past year, growth was steady at 15.7 percent. Among its honors and awards, Eide Bailly ranked as one of the 20 best accounting firms in North America for quality of life issues and prestige in Vault.com's 2017 Vault Accounting 50 report. The firm also ranked as one of the 15 best accounting firms for formal training in Vault's 2017 report.

Employee reviews published by Vault revealed an appreciation for growth opportunities and professional development within the firm.

"Eide Bailly allows their staff to take ownership of their careers, and their managers and partners are committed to supporting staff through their career goals," one employee review said.

"The Eide Bailly culture is one that provides me with every opportunity to succeed at all things that are important to me, including my professional development, personal growth and time with my family," another employee review said.

It seems safe to say the firm's desire to foster a "One Firm" concept by providing consistent messaging and quality education to staff and partners is paying off. Eide Bailly's culture has helped fuel collaboration across industry, service and geographic lines, enabling seamless delivery of solutions to clients and bolstering the bottom line.

About Eide Bailly

Eide Bailly prides itself in forward-thinking partners, talented staff and a strong vision for the future. As a result, the firm is on track to realize their goal of doubling in size within five years. Eide Bailly strives to never lose sight of what they value most: hiring the best people, expanding the firm's service lines, looking for new opportunities and finding better ways to serve clients.

About Checkpoint Learning Solutions

■ AuditWatch Efficiency Initiative

The AuditWatch Efficiency Initiative is a change program that delivers the industry best practices and core training needed to improve every engagement. The customization is determined based on key considerations of firm management including firm objectives, size and structure, coverage of partners, industries and offices and timing that meets the firm's needs. This comprehensive program includes four phases: diagnostic, best practices seminar, team reengineering workshops and implementation strategy.

■ TaxWatch University

TaxWatch University is tax staff training presented by Checkpoint Learning In-House Training and AuditWatch. The progressive training begins with an entry-level course focused on common topics likely to be encountered in the first year. This is followed by courses that provide greater depth on corporate tax issues, partnerships, LLCs and other special entities.

■ Checkpoint Learning CPE Courses

Checkpoint Learning provides continuing professional education and training solutions for tax, accounting and finance professionals. Our courses feature expert-led instruction on the latest developments in tax, accounting, auditing and more. Choose from more than 375 interactive online courses and 1,875 credits of CPE training available exclusively on the Checkpoint Learning platform.

■ LearnLive

LearnLive automates the creation, delivery, management and certification of accredited eLearning programs for professionals in the accounting, legal and finance fields while overseeing real-time learning management, administration registering and cataloging.

RECOMMENDED RESOURCES

Premier Plus CPE Package

Premier Plus CPE package offers the most learning options for an unbeatable annual price. Enjoy the flexibility and convenience of online and on-location learning options plus timely, high quality topical content. You'll get unlimited access to more than 650 interactive online courses and all Checkpoint Learning webinars, deep discounts on live events and more. [Learn More: cl.tr.com/cpesolutions/PLSW](http://cl.tr.com/cpesolutions/PLSW)

AuditWatch University

AuditWatch University is an integrated development curriculum that provides your firm with the knowledge and skills to advance your professional staff. Starting with Basic Staff Training and culminating with management-level courses, AuditWatch University offers seven progressive levels of training. [Learn More: auditwatch.com/AWU](http://auditwatch.com/AWU)

TaxWatch University

TaxWatch University offers multiple levels of core tax staff training for your firm. The progressive training begins with an entry-level course focused on common topics likely to be encountered in the first year. This is followed by courses that provide greater depth on corporate tax issues, partnerships, LLCs and other special entities. [Learn More: auditwatch.com/TWU](http://auditwatch.com/TWU)

AuditWatch Consulting

AuditWatch has an intense focus on serving the audit and accounting profession with leading experts to train and consult with firms that provide auditing services. Our integrated development curriculum for audit professionals and CPA firms, audit process consulting and audit technology services makes AuditWatch the recognized leader in audit productivity. [Learn More: auditwatch.com/consulting](http://auditwatch.com/consulting)

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About Thomson Reuters Checkpoint Learning®

Checkpoint Learning provides training and continuing professional education (CPE) solutions for tax, accounting and finance professionals and firms. From customized group training to more than 900 individual webinar, online self-study and public seminar and conference events, Checkpoint Learning offer a full range of solutions to build learning plans for both individuals and teams. Our mission is to improve the productivity and profitability of accounting, tax and corporate finance professionals by rethinking traditional processes, leveraging cutting-edge technology and providing the most accurate and insightful training available.

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