

Advancing workflow for more efficient & secure audit engagement.

Katz, Sapper & Miller
Certified Public Accountants

How an ongoing partnership with Confirmation.com helps a firm continually achieve higher levels of audit workflow efficiency.

Katz, Sapper & Miller (KSM) is a large and growing accounting, tax, audit, and consulting firm with offices in Indiana and New York. The team at KSM is known for being entrepreneurial-minded and results-focused, both when working with clients and when working to improve the efficiency of their firm's workflows. Audit engagements are a major driver of firm revenue with KSM's audit department — led by director Amanda J. Horvath — on pace to complete more than 600 audit engagements this year.

How does the firm keep their audit workflow going steadily? According to Horvath, it's due to the firm's progressive and diligent approach to continually improving their processes, in which Confirmation.com plays a key part. For eight years, the firm has depended on Confirmation.com to help streamline and centralize the confirmation process for audit engagements. As she stated, "Confirmation.com has evolved with our firm, becoming an essential tool that enables our team to serve clients across the country and maximize our administrative resources as we continue to grow."

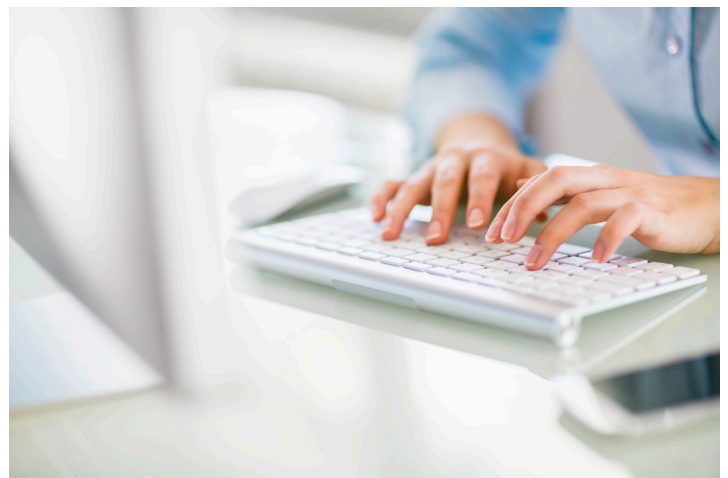
Using Confirmation.com goes well beyond the benefits of convenience and efficiency for KSM, according to Arlene Mahaney one of two executive assistants who help manage KSM's centralized confirmation process. "As we serve more and more clients across the country, our team can't just run back to the office to see if a confirmation has come in," she stated. "So Confirmation.com is a very practical tool from that perspective, allowing us to centralize and complete the confirmation process more quickly, efficiently and securely for our team members who are out in the field. Plus, with

Confirmation.com we have confidence that our electronic confirmations are going to the right place, which helps to protect our clients from fraud."

From paper-based to progress-driven

KSM has had a long relationship with Confirmation.com, and today uses the system for cash, debt, and legal confirmations. Mahaney recalls what it was like prior to implementation. "There was so much back and forth, requiring multiple steps. An internal review of our workflow process determined the need for Confirmation.com to eliminate the majority of this administrative work that held up the audit process and consumed a lot of administrative time."

Needless to say, it was a relief to have the burden of a manual, paper-based confirmation process replaced with the web-based efficiency of Confirmation.com. According to Mahaney, overall, the initial implementation was smooth. And because KSM has a centralized model, it did not require a lot of training beyond the core administrative staff.





“Confirmation.com provides us with exceptional service. Their support is like a safety net for our firm...that’s something we don’t see with other software vendors.”

Amanda J. Horvath
Director, Katz, Sapper & Miller

In KSM’s workflow, the firm’s professional staff simply complete the necessary client information forms (or help their clients do so), then pass it along to Mahaney or her cohort to enter the details. It’s proven to be an efficient process that has been embraced by the firm and its clients — all of whom appreciate the streamlined method.

Although Horvath was not involved in the initial implementation, she agrees that Confirmation.com profoundly benefits the firm’s audit workflow. “When you look at the boxes and arrows on a typical audit workflow diagram, Confirmation.com really helps to reduce the number of them significantly. Each time we review our audit workflow, we find a different component of the system that can help us further streamline and eliminate unnecessary steps, freeing up as much administrative time as possible so we can keep the workflow moving forward.”

Final words

The enhanced efficiency and security of their confirmation process are central reasons why the KSM audit team continues to make Confirmation.com an integral part of their workflow. KSM is also very appreciative of the service and support that Confirmation.com provides.

“The support team is really exceptional. They recommend best practices, but there’s still room for flexibility in the process which is important to us,” said Horvath. “We really see Confirmation.com as a safety net when issues do arise. We used to try to troubleshoot any problems that came up with specific confirmations on our own, which was time-consuming and inefficient. Now we know that our customer service liaison at Confirmation.com will take care of them for us. We just don’t see that level of service with the other software providers we use.”



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