M-Files
The Smarter Way to Work.



# CASE STUDY

## DRIVING DIGITIZATION AND CONNECTING CONTENT ACROSS PLATFORMS

Crowe

Company name
**Crowe U.K. LLP**

Industry
**Audit, tax, advisory and risk**

Location
**United Kingdom**

**CROWE U.K. LLP:**

# Enables seamless collaboration, automates information-driven business processes with M-Files.

Crowe U.K. LLP (Crowe UK) is a leading audit, tax, advisory and risk firm with a national presence to complement its international reach. The business is an independent member of Crowe Global, one of the top 10 accounting networks in the world, with 200-plus independent accounting and advisory firms in more than 145 countries.

Crowe UK is trusted by thousands of clients for its specialist advice, its ability to make smart decisions and its readiness to provide lasting value. Its broad technical expertise and deep market knowledge means it is well placed to offer insight and pragmatic advice to businesses of all sizes, professional practices, nonprofit organizations, pension funds and private clients.

## WHY M-FILES?

CONNECTED CONTENT

INTUITIVE USER EXPERIENCE

INTELLIGENT, AUTOMATED DOCUMENT-BASED WORFLOWS



Sharing documents nationally was convoluted for Crowe UK's 1,000-plus employees and partners, resulting in wasted time and frustrated teams. As the firm operated from network drives and SharePoint, making files available to others meant either emailing them or changing access to the firm's file sharing system, which required complex security managed by the firm's national technology arm. That hindered collaboration across functions and its six offices because Crowe UK uses documents in almost every process it has. It was also time consuming to monitor for GDPR compliance.

People working across departments sometimes had difficulty determining what versions of given documents were up to date, raising the need for a single source of truth and assurance that no matter how they accessed it, they were indeed working with the latest version of a document.

Having experienced significant growth, Crowe UK required more support from its technology infrastructure. It was apparent that network drives and folders could not support its expansion.

With competition increasing in its industry, Crowe UK's future growth depended partly on improving performance from its business, its people, and increasing efficiency. But information siloes in its service lines were hindering its objective of creating a uniform experience for clients. It needed a flexible solution that would adapt to its particular business needs, improve information access, reduce content chaos and remove siloes.

The firm's leadership saw that centralizing documents was more efficient, cost effective and collaborative, according to Ian Norman, National Technology Director at Crowe UK. "We decided quite some time ago that using file shares was not a particularly sophisticated thing to do," he said.

"So, moving away from file shares and utilizing the inherent sophistication of a document management system was seen as an important key element in the firm's overall digital transformation initiative."

The firm needed a content services platform with workflows to automate the assigning and monitoring of tasks. The workflows were needed to help Crowe UK push documents through reviews and approvals, obtain signatures, and ensure retention of critical information. Metadata tags would help guide the workflow stages.

"Our biggest objectives were around agility, cross-office collaboration and ease of use internally, with a longer-term view to reconsider client collaboration," said Katy Bayliss, Director of National Client Solutions at Crowe UK.

Crowe UK's leaders wanted to equip employees with technology that would increase their productivity and help provide better customer service.

The platform's user interface had to be easy to use and understand because some in the firm might have had difficulty moving from a traditional file system to a sophisticated document management platform.

As part of the evaluation process, a team assessed six products, including M-Files and SharePoint, on factors such as functionality and cost. "We'd not used M-Files before, but we liked what we saw in our initial evaluations," Ian said.

The M-Files approach to managing documents resonated with Crowe UK, as the firm desired visibility and integration across its systems and repositories. The M-Files platform would offer a single view into information, regardless of what it was and which system it was stored in, reducing the need to migrate data.



"Our implementation (of M-Files) took place in August 2020, right during the pandemic. M-Files were able to adapt with us and roll out a fully functioning system under lockdown conditions to more than a thousand people. This underlined what we felt is a modern, flexible approach to a client-supplier interaction."

**Ian Norman**
National Technology Director,
**Crowe UK**

Part of what distinguished M-Files was its fully integrated workflow capabilities. "We were not really convinced that a lot of the other competitors that it came up against had a truly integrated workflow," Ian said.

That helped persuade Crowe UK to adopt the platform, along with its easy to use interface -and the team behind it.

"Our implementation took place in August 2020, right during the pandemic," Ian said. "M-Files was able to adapt with us and roll out a fully functioning system under lockdown conditions to more than a thousand people. This underlined what we felt is a modern, flexible approach to a client-supplier interaction."

With M-Files making it easier to access information needed to do their jobs, employees could better adjust to remote work.  This helped them juggle their workload and handle issues such as stressed clients all while some were home schooling their children.

## WORKFLOWS STREAMLINE AND SIMPLIFY ROUTINE TASKS

Crowe UK has found M-Files ticks a number of boxes in its digital transformation strategy.

For instance, M-Files, which is fully cloud based, makes all of the business' documentation available for national collaboration. It stores documents and tags them by client and job. It updates client and work data automatically by integrating with the firm's practice management system. Crowe UK employees can easily use the software to develop workflows.

The firm now has a number of workflows growing on a monthly basis, managing such things as incoming posts, corporate tax work, and general sign-off of day-to-day documentation, Ian said. Team leaders and partners use workflows to approve deliverables before sending to clients.

Security is much simpler to manage but much more flexible and transparent, whether for departments, clients, jobs, or files, according to Ian. For employees who favor a more traditional file retrieval process over M-Files' sophisticated search engines, the platform's views functionality makes it easy to find information, Ian said.

"For this project, we had several workshops, which included all areas of the business. This enabled us to build a system which was suitable for the business rather than a system that was just forced on a user base. We identified M-Files champions and developed a comprehensive, cloud-based library of training videos which were available 24/7 that anybody could use prior to the launch."

The project team carefully monitored the project from start to finish. "We had a post-implementation review and concluded that this is one of the projects where there was very little if anything that we would have done differently," Ian added. "For all of the people using M-Files, which is just about everybody at the moment, it's working as planned."

## ACHIEVING FULL COLLABORATION

The next stage in Crowe UK's journey with M-Files will be setting up workflows for the firm's technology help desk system, which is currently on SharePoint. "We are going to use the workflow system within M-Files to develop a new system from scratch. And there will be a great deal of further integration with other core strategic systems," Ian said.

Crowe UK implemented an enhancement workflow in M-Files that enables users to ask for changes to the software, Ian said. While the scope of the requests to date have been small, he added that more will come in about 12 months or so after the implementation.

"We haven't had the usual requests for speeding up the system or totally changing the processes," Ian said.

Having gotten its internal collaboration right, Crowe UK will now improve workflow and collaboration with clients and focus on providing a best-in-class digital client experience.

"The M-Files team continues to support us and takes the time to understand what we ask for," Katy said.

The initial reason that prompted Crowe UK to select M-Files was to improve collaboration across offices and functions, which has seen marked improvement. "We feel we have full collaboration," Ian said. "M-Files has been an important tool in solving this problem."



"I believe that Crowe UK made the right choice with M-Files, and we see this as a long-term partnership for Crowe UK and M-Files going forward."

**Ian Norman**
National Technology Director,
**Crowe UK**

Working with M-Files' project team was a "great experience," he added.

"They were always accessible, friendly and helpful," he said. "I wish all of our projects had been like this. I believe that Crowe UK made the right choice with M-Files and we see this as a long-term partnership for Crowe UK and M-Files going forward. We view M-Files as the go-to application or solution for document storage and workflow management."

## WHY M-FILES?

M-Files' AI-powered intelligent information management solution connects all documents and information, across every platform and repository, then analyzes them to place them in context. This makes it possible to serve up the right information to the right people right when they need it—and automate information-driven business processes—while maintaining complete control and compliance. Thousands of organizations in more than 100 countries (including NBC Universal, OMV, SAS Institute, and ThyssenKrupp) use M-Files to manage their business information and processes—and give their employees a Smarter Way to Work.

For more information, visit **www.m-files.com**.


**Website**
www.m-files.com

**Email**
sales@m-files.com

**UK Phone Number**
+44 (0)3300 889569

**Finland Phone Number**
+358 3 3138 7500

**USA Phone Number**
+1 972 516 4210


M-Files®
*The Smarter Way to Work.*

*M-Files is a registered trademark of M-Files Corporation. All other registered trademarks belong to their respective owners.*