



ACCELERATED ADOPTION

A Case Study Of Record-Breaking Client Implementation

K1x, a leading provider of innovative solutions in tax compliance, recently partnered with a strategic client to implement its premier tax exempt 990 e-file solution. This case study delves into the journey of this collaboration, highlighting the remarkable achievement for record levels of adoption within a mere four months of going live.



CLIENT BACKGROUND

Our client, Forvis Mazars, LLP, is a Top 10 US accounting firm & prominent player in public accounting, known for its commitment to deliver an Unmatched Client Experience[®]. It is the 4th largest preparer of the Form 990 series information returns. As a conglomerate of legacy firms facing evolving market demands and the need for enhanced efficiency, they sought a transformative software solution to streamline their processes and drive growth.

CHALLENGES FACED

Prior to the implementation of K1x's solution, Forvis Mazars faced several challenges, including:



INCONSISTENT PROCESSES

As the result of a merger of 2 large firms, processes were inconsistent between offices, regions, and legacy firms. This led to inefficiencies, hindering consistent processes, training & client deliverables.



MAINTENANCE COSTS

The maintenance of home-grown solutions significantly impacted operational costs and margin.



ANTIQUATED TECHNOLOGY

Legacy products and process challenged the firm's ability to grow and scale while impacting the client experience using outdated technology.



SOLUTION IMPLEMENTED

Recognizing the needs of this large accounting firm, K1x tailored a comprehensive success plan to help Forvis Mazars modernize its technology & processes across the firmwide practice.



IMPLEMENTATION

From tenant creation, to white labeling, to SSO configuration, K1x created a seamless environment for success.



ONBOARDING & TRAINING

Prescribed weekly activities to drive toward significant milestones and recommended training programs.



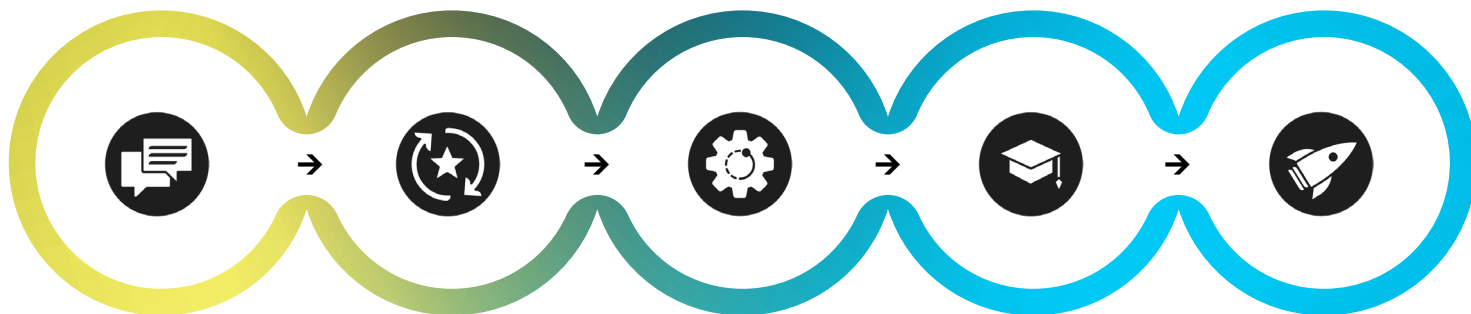
RESOURCES & SUPPORT

Ongoing meetings with stakeholders and champion groups tracking against an action plan, supplemented by self-serve and responsive & knowledgeable human support resources.



IMPLEMENTATION PROCESS

The implementation process was thoroughly planned and executed in phases:



ASSESSMENT & PLANNING

Detailed discovery around existing Forvis Mazars tooling & processes, followed by collaborative planning to define objectives & milestones for K1x adoption.

PILOT TESTING

Iterative pilot testing to identify & address any issues or concerns before full-scale deployment, including feedback from clients to compare & contrast solutions.

CONFIGURATION & CUSTOMIZATION

White labeling of K1x's solution to suit Forvis Mazars' branding needs, including SSO configuration for seamless access & alignment with existing workflows.

TRAINING & CHANGE MANAGEMENT

Comprehensive training programs conducted for associates at various levels & different roles, coupled with effective change management strategies to mitigate resistance & foster a culture of adoption.

GO-LIVE & SUPPORT

Smooth transition to the new system, accompanied by continuous support & monitoring to address any challenges & optimize performance.

RESULTS ACHIEVED

The implementation of K1x's solution yielded noteworthy results:

RECORD-BREAKING ADOPTION

Within just four months of going live, Forvis Mazars achieved record levels of adoption among its employees, surpassing all expectations. This also helped to increase the alignment of team members across legacy firms.

INCREASED EFFICIENCY

Streamlined processes and enhanced collaboration led to an increase in operational efficiency, resulting in cost savings and improved productivity and client experience.

DATA-DRIVEN DECISION MAKING

Access to real-time insights and analytics empowered Forvis Mazars to make informed, data-driven decisions leading to a critical deadline.

POSITIVE USER FEEDBACK

Overall positive feedback from internal users, who embraced the new system and recognized its value in simplifying their workflows and enhancing their productivity with clients, who also expressed overall positive feedback.

CONCLUSION

The collaboration between K1x and Forvis Mazars stands as a testament to the power of innovation and strategic partnership in driving organizational transformation. Through a tailored solution, comprehensive support, and a focus on user adoption, Forvis Mazars not only overcame existing challenges but also set a new standard for accelerated adoption in the industry. As they continue to leverage K1x's solutions, they are poised for sustained success and continued growth in the ever-evolving landscape of public accounting.