

The background of the slide is a deep teal color. It features a large, semi-transparent graphic of a hand holding a globe. The globe is covered in a circuit board pattern with various lines and circular nodes. To the right of the hand and globe, there is a network diagram with several blue circular nodes connected by thin white lines. At the bottom of the slide, there is a decorative border made of a series of triangles in various shades of blue, green, and yellow.

Case Study: **Aeberli Practice Digitisation**

The Journey of Practice Digitisation for Aeberli

Aeberli is a dynamic Swiss accountancy firm that is successfully navigating major organisational and cultural change. In 2019 they faced up to the challenge of succession and through a carefully managed process were able to pass the management and ownership of the business to the next generation.

But they soon realised they couldn't stop there. More radical strategic change was needed if they were to grow at the pace they wanted. The young partners organised a series of strategy days in which they considered how to achieve their vision – their 'target state'.

Fundamental to their approach was to consider how rapid changes in technology was impacting clients, the profession, skills and working practices – and in this context what form the 'model' consulting practice might take.

They bravely considered 3 critical questions:

1. Will we be able to recruit (good) staff in the future if we provide employees with an outdated infrastructure?
2. Can we still process customer information at all if we are not able to receive it digitally in a data secured environment?
3. In a changed world, will we still be profitable if we don't automate the simple tasks?

▀▀ We concluded that far from being a ROI calculation from investment required it was actually a question of whether Aeberli will still be around in 10 or 20 years if we didn't immediately get ready for this new world. ▀▀

Partner Aeberli.

They soon realised that change was needed and needed now, and the drivers for that change were around keeping pace with client digitisation and change, aligning operational capability with the skills and expectation of future employees and needing to embrace the efficiencies of automation and AI.



Dealing with resistance to change - Who and what were the blockers?

The No1 prerequisite for a successful project start was the fact that the entire management was completely convinced of the necessity and importance of the project.

The majority of the workforce supported the new strategy with enthusiasm. Only a few employees viewed the new processes with scepticism and the partners were able to manage them at the beginning, convincing most of them that it was the right way to go.

Importantly Aeberli didn't shy away from dealing with the entrenched naysayers, who have either decided to leave the company or were replaced. This sent an important and strong message to the rest of the team.

■ ■ We aligned our organization accordingly by implementing a new department "digitisation & special projects" and providing the appropriate human resources. It was thus officially and openly visible to all employees the strategy we were pursuing and that we were serious.

Partner Aeberli. ■ ■



Goals and Vision

Interestingly Aeberli's goal was not digitisation per se, but the vision of making Aeberli one of the top 10 consulting companies in the greater Zurich area in the next few years. To become a company that stands for professionalism, dynamism and modernity for customers and (potential) employees.

Digitisation wasn't the goal, but a necessary piece of the puzzle. A company that still enters booking receipts by hand into outdated software and still writes the envelopes with a typewriter can no longer be perceived as professional, dynamic and modern.



Practical steps forward on journey

This is still a working project, but did have a fast start through the establishment of the Digitalization and Special Projects Department. After that key steps included:

1. All physical documents were digitised (scanned and stored) secured with the help of student employees and took about 6 months. A long time, which was necessary, but in which there was (still) no progress in terms of efficiency and automation, which made the criticism of the blockers louder.
2. Implementation of a completely new IT landscape. Non-IT interfaces have been replaced by cloud-enabled solutions and the latest technologies on the market.
3. Choosing new software was a challenge but so was the parallel running of old and new software through transition. It was not possible to bring all accounting customers to the new software on a key change over date because Aeberli didn't have the resources. And so, a steady 5 customers per month were transferred, taking some 2 years.
4. Full digitisation of documents and clients meant that digital workflows could be introduced. For example, the physical mail has since been scanned by an intern and distributed to the employees via incoming mail software. The employees receive a notification when new mail has been received for them as well as a deadline by when the mail is to be processed (e.g. due to the tax deadlines, which are already recorded by the intern). This means that the responsible employee automatically receives a reminder when the deadline expires. In addition, Aeberli have introduced a kind of "Aeberli Dropbox" which serves as a data exchange platform for customers. All communication and data exchange can take place via this digital platform if the customer wishes.

It is clear that the first months or even years of the project do not lead to an increase in efficiency, even the opposite is the case. But this first phase is necessary in order to even start the next phase. How can I automate the document flow if the documents have not been digitised beforehand? ▀ ▀

Partner Aeberli.

A photograph showing two business professionals in suits. One person is holding a tablet, and the other is pointing at the screen. The image has a blue tint.

How much more to go?

Digitisation is a dynamic process but the initial project “digitisation” will take a total of 3 years of which Aeberli is a year and half in. This phase has been about preparatory work with the aim of automating the processes afterwards.

When all Aeberli’s customers are all transferred to the new system they will connect the software to the customer’s bank accounts - meaning that all bank transactions can be booked automatically by pressing a button.

And now Aeberli have turned their experience into a new service line offering clients a process optimization and digitisation service. The Digitization & Special Projects Department has been converted into a profit center.

“ We are also in the process of creating interfaces between our systems and the systems of government agencies, for example in order to automatically transmit payroll data, tax data, etc. to the appropriate agencies. So, we are moving from digitisation to automation.

Partner Aeberli. ”

A photograph showing a person's hand holding a pen, with a digital overlay of various icons (globe, Wi-Fi, shopping cart, etc.) and a glowing blue line. The image has a blue tint.

Lessons learnt

This is a complex multifaceted project but the partners have discovered that despite supplier claims of the opposite, there is no single software that can do everything.

Before you can even start selecting the software, you have to define which processes and tasks there are in the company and how you want to implement these in the future. Since it is sometimes very difficult to find suitable software for individual needs, Aeberli decided to work with a software development company that develops software for Swiss consulting firms. The cooperation means that they provide the input for what the software must be able to do.

There is a quid pro quo with the software house. In return for Aeberli helping to develop a marketable software platform designed for an accounting and consulting firm, they now receive CRM software that is tailored precisely to their needs at a very reasonable price.

“All in all, we paid a lot of money to learn, but also gained a lot of knowledge along the way. If we had had this knowledge beforehand, we would certainly have saved ourselves a lot. However, we can't really say that we would have preferred to have done something different, as we simply couldn't have known it better.”

A Partner

Conclusion

Every firm has its own individual needs, there is no basic recipe for digitisation, each firm has to make its own analysis and draw the individual conclusions and take the appropriate measures. But one thing is certain, the changes that Aeberli are embracing are impacting most accounting firms right now. The question will be “have you responded early enough to not lose ground to your competitors and to secure the future of your business for the next 20 years?”

Aeberli realised that technology, automation and AI are either an existential threat or a commercial opportunity, they chose the hard path to re-model the business to capitalise on future change.

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