



Baker Tilly DR Digital Transformation 13 Applications in 12 Months

APRIL 2022

A BAKER TILLY DOMINICAN REPUBLIC DIGITAL TRANSFORMATION STUDY

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Now, for tomorrow



Executive Summary

Baker Tilly Digital, located in the Dominican Republic, has long experience in a variety of digital initiatives. In recent years, we partnered with Appian Corporation as reseller for their low-code automation platform. A year later our digital department acquired the Appian low-code platform for internal automation, where the goal was to make our business more efficient. With this acquisition, we have been able to develop more applications quickly and at a lower cost. Development has accelerated by 17x, reducing time-to-value of applications by 50%. Our legacy application portfolio was reduced by 50%.

Appian offers a low-code automation platform that allows organizations to build enterprise and customer-facing applications at enhanced speeds and reduces costs. It also helps integrate broad, complex workflow automation into their employees' roles, improving efficiency and accelerating revenue.

Prior to using [Appian](#), we suffered from environments that required a high amount of manual work to achieve our business goals. Some of our processes used spreadsheets to manage and track workflows, which created a lot of manual unnecessary work. The data used for day-to-day operations were not shared between the different entities across the organization, and the amount of accumulated paperwork was significant.

KEY STATISTICS



Return on investment (ROI)
389%

Accelerated application delivery

17x



Key Findings

Accelerated application development 17x

Accelerated application development by 17x

Compared with customer-code environments, Appian enabled us to leverage low-code development processes to speed up application development by 17x, reduce the number of resources required to develop by 60%, and decrease the cost of development resources by 50%.

Improved time-to-value of applications by 50%

By speeding up time to develop by 17x, we have reduced the time it took to take a customer-facing application to market or an employee-facing application to deployment by 50%. This also shortened the time-to-value of these applications by the same amount.

Simplification and automation of application portfolio reduced costs by 50%

We have been able to link applications together into complex, automated workflows. This allowed certain legacy applications to be bypassed if they were not needed for the workflow. Because of a reduction in applications needed, we saw cost savings related to software licensing, hardware licensing, and the data center space needed to house application hardware.

Complex automation

With Appian, we have been able to automate complex processes with less effort. There are some processes that would have been impossible to automate on our end if we did not have available an army of qualified programmers, such as AI integrations, RPA, and other complex algorithms which are coming as pre-build modules inside the system.

“We have noticed that Appian works for low-code automation regardless of the specific applications or use cases to which it is applied.”

The Appian Journey

Before investing in Appian, we had experienced time-intensive and expensive workflows across a variety of use cases stemming from manual processes and a lack of automation. The use of distinct processes in different departments exacerbated these problems. Baker Tilly adopted software applications in an effort to simplify processes; instead, they added to the complexity of their environments, as these apps proliferated to target individual use cases rather than organization-wide needs. We struggled with common challenges:

Key Challenges

Time-intensive workloads from inefficient processes

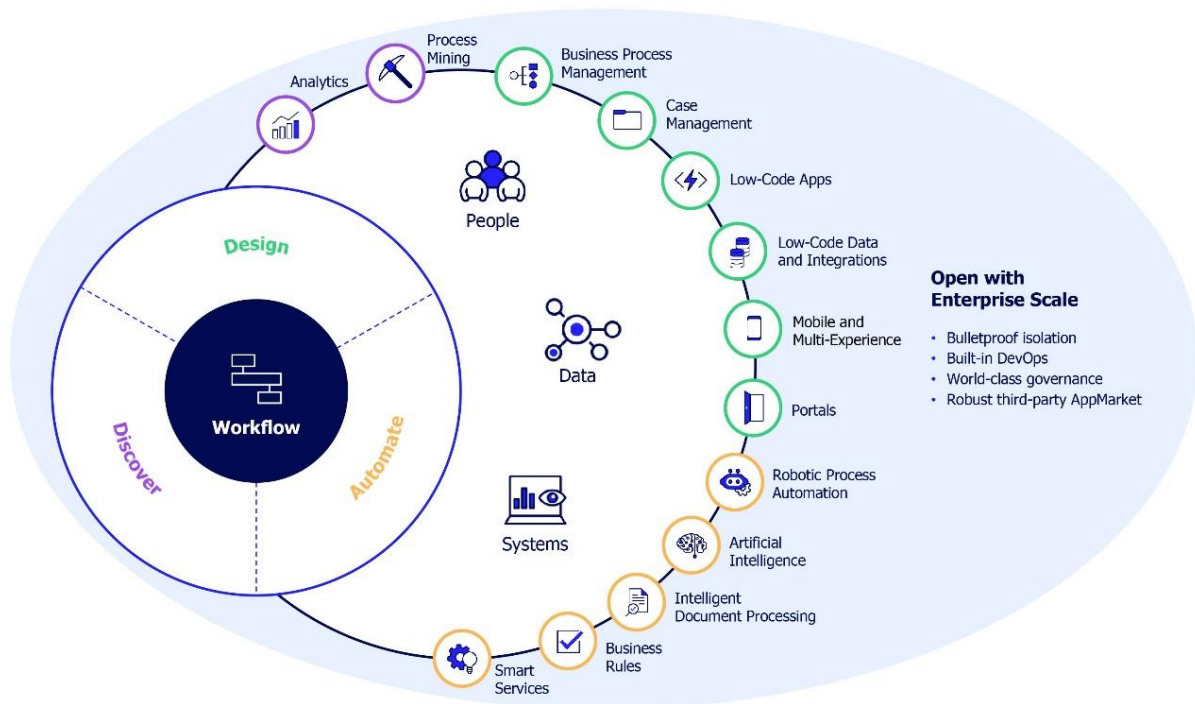


Fig.1



KEY CHALLENGES

Appian workflow is core and similar to low-code and woven into everything Appian does: discover, design, and automate.

With the platform we have been able to discover, design, and automate by connecting our resources – people, data, and systems into a seamless workflow. This helped us get the most out of their existing resources. And our approach to low-code data, as just mentioned previously, was a major accelerator.

Fig.1 is showing a selected set of capabilities, grouped by category, that are available out-of-the-box with our platform.

- **Breadth of capabilities** – We saw that the platform delivers natively a significant breadth of capabilities. To get the equivalent would require you to work with several vendors, and yet they'd still fall short because they'd lack the seamless nature of our unified platform.
- **Use cases and solutions** – All the capabilities shown, and more, are included in the platform, so customers can pick the right combination of technologies for their specific use case.
- **Automation suite** – Automation suite extends beyond just RPA—it also includes Artificial Intelligence (AI), Intelligent Document Processing (IDP), business rules, and Smart Services. This is how we were empowered to select what's best for our specific use case.

Some of the different modules include:

- **Smart Services** – Within our automation capabilities, Smart Services are not something we've promoted externally

before, so it's important to understand what they are and their value. Smart Services automate common business activities. They're drag-and-drop, more resilient than RPA, and don't require dedicated hardware. They're a strong differentiator against RPA vendors. Our automated smart services allow customers to easily:

- **Send and receive emails and other notifications**
- **Integrate with databases and web services**
- **Orchestrate other automation technologies like RPA and AI**
- **Generate PDF, Word, and other documents**
- **Manage users and group membership**
- **And more**
- **RPA** – Having Appian RPA natively integrated into the system has been a big help. We were able to access all data and objects from the base system inside Appian RPA, otherwise, API connection and data integration would be required for each data set that has to be exchanged between both core systems.
- **Business Process Management** – Integrating with low-code development and low-code data has allowed us to have seamless workflows, integrated with other systems and all in one ecosystem.
- **Mobile** – Everything is mobile natively through the prebuilt Appian application, which is available through Google and Android Stores. Many systems usually offer a mobile application for access to some features (40%) on the core system, but not all. Appian's mobile app is basically a Proxy to the main system, where 96% of the functionality is available and has the same structural logic. The functionalities inside the base system are represented for the user in the mobile app.

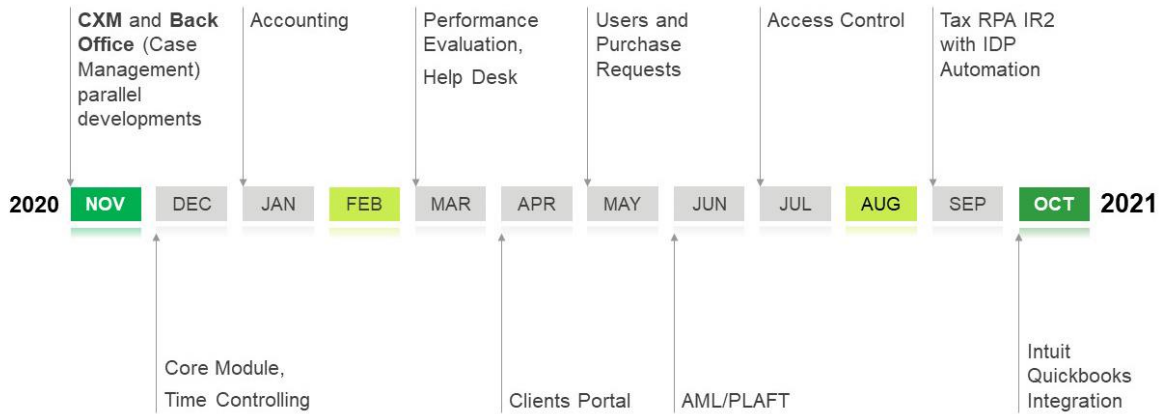


Fig.2

Exploring all the platform functionalities back in 2021, we started with a small team of one digital analyst and two to three developers working on our internal digital transformation.

The first adoption was made to recreate currently existing software for case management inside the Appian platform and amplify its functionalities by extension. Without a previous platform, we would have needed an army of development resources to achieve the current platform’s functions. Further to the development, we have been able to achieve the following **13 applications** in production within **12 months**:

1

Baker Tilly Case Management Platform (CMP)

Is a solution where processes are less structured, interactions are more ad hoc and events and milestones are easy to schedule. This Solution is for a type of work where a lot of data from different sources must be collected, analyzed, summarized, and acted upon for decision making. Our Solution

focuses on a drive of all business processes within one company, from the first interaction with the client, case progress, task management, resources, time management, case budget, billing, and alerts.

2

Baker Tilly Customer Experience Management (CXM)

Is a solution with 360 visions of the commercial activity in the organization, through the traceability of sales activities, opportunities, and initiatives, AML verification.

3

Baker Tilly Accounting

At this point, we had most of the needs organized into a single, unified platform. But increasing capabilities opens a new possibility for other automation and with that came the need for an **accounting** application. We currently have and still use Intuit QuickBooks,

but there was a small need for user collaboration and QuickBooks. In order to create a smooth experience between users inside the company, we decided to integrate Quickbooks with the accounting application on Appian, which basically extended Quickbooks functionalities where needed, using the same licensing users from the core system. In this case, the collaborators did not need to have access to Quickbooks to request an invoice or to generate a report for their particular area. Everything was achieved by integrating Appian and Quickbooks . The result saved hours of repetitive work for the accounting department, which in the past had to do all this process manually. Right now, with a click of a button, an invoice can be generated and sent to the client directly.

4

Help Desk Application

The Help Desk application is a solution that was developed in a week timeframe, and its primary function is to serve internal collaborators' needs within the system, bugs reporting, requests for new features, etc.

5

Purchase and collaborators requests

Currently, every single request is managed within the Purchase management application. This includes purchase requests, travel expenses, vacations, actions, etc. with the complex routing of approval tasks with the automatic generation of the required final documents in PDF, Word, Excel files. The low-code data allows the request's data to be

shared across all of the other applications inside the system where it is necessary to generate reports or KPIs, for example, travel expenses are related to customers' cases for better estimation of final case bills.

6

Control assistance

Employees can check in to the office via company tablet or their mobile phone, with photo, RQ scanning or current GPS location capturing.

7

(AML) Verification

Integrated application directly inside **CXM** for Anti Money Laundering compliance. Applications is developed with the mind later this year to be connected with the Baker Tilly International Client's Independence Database. This will close the whole loop for client's verification requirement.

8

IR2 Tax Automation Robot

IR2 Robot automates an end-to-end process for data insertion inside the Local Tax Agency Portal. The normal time for a form to be completed in the past was around an hour and a half. With the Tax Robot, we have reduced this time to 10 minutes per form, depending on the amount of data inside each form and without human errors in the data insertion. This particular process is a huge help for the tax department, especially in cases where the

other system does not offer API integration and the work is tedious.

9

HR Performance Evaluations

Application for performance evaluations.

10

Clients Portal

External client's portal developed in Node.JS and integrated with Appian for serving external clients needs, as current cases, deliverables, invoicing, and customer satisfaction surveys.

11

Core Module

Application for internal user management. Currently working as the orchestrator of all user's needs with the rest of the applications within the system.

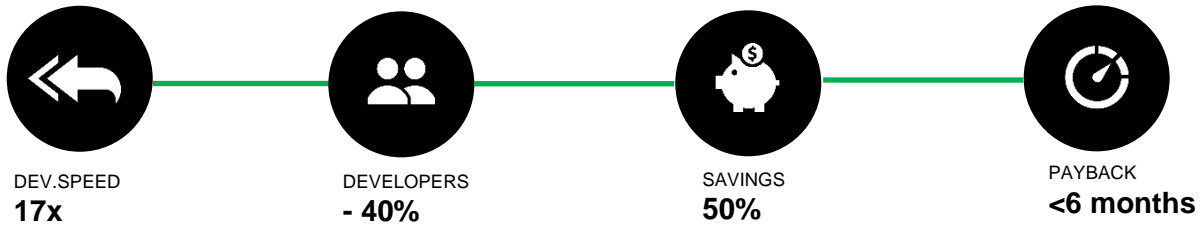
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User Time Sheet

Working hours' time control application which monitors case performance, client satisfaction, and employee occupancy with intelligent alerts.

Analysis of Benefits

REDUCED COST OF DEVELOPMENT USING LOW-CODE



Evidence and data

In our internal practice, the Appian Low-Code Automation Platform reduced firm cost per development project by:



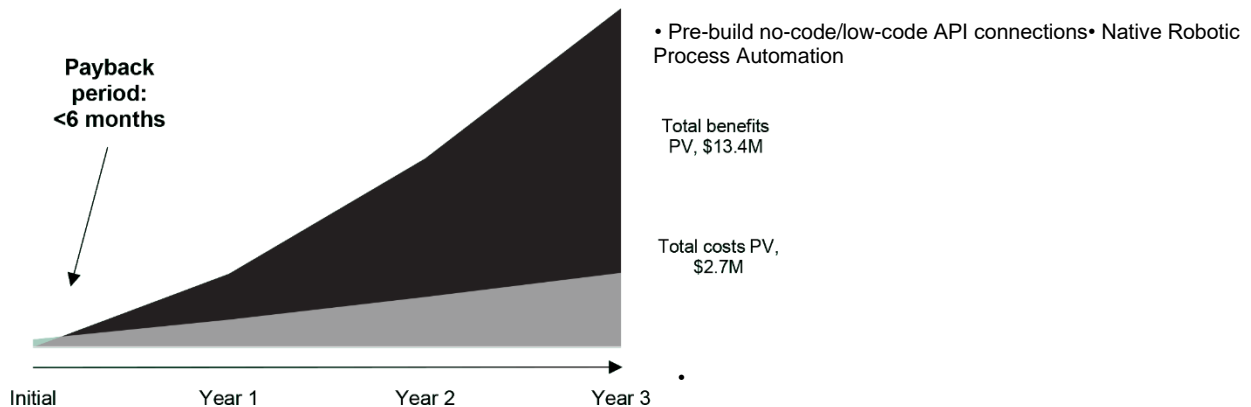
Improving development speed by an average of 17x

Data by BTRD Digital

Enabling the use of fewer senior development resources for low-code development projects, saving approximately 50% of these expenses.

Appian provides numerous functionalities that help achieve these cost savings, including:

- A drag-and-drop visual design
- A library of reusable components
- A common data foundation called Appian Records
- One-click application deployment



Data by Forester

Similarly, we have realized a time-to-value benefit for our organizations thanks to faster development. Faster development led to faster release of applications, whether aimed at generating revenues or at improving employee productivity. On average, the 94% reduction in time needed to develop applications led to a 50% reduction in the time to release applications.

“Appian gave us a way to connect Application A with Application D, skipping B and C completely. Thanks to this, we’ve reduced our application portfolio by 50%.”

End Notes

The following report was created based on Baker Tilly Digital’s (Dominican Republic) experience for more than 2 years as a partner as well as a customer of Appian Corporation. Used data comes from Baker Tilly Digital development experience and from Forester. Our internal digital transformation continues today, and we are looking forward to the bright future of the low-code/no-code trend—both internally as well as in meeting our clients’ needs.

Now, for tomorrow

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