



ABOUT BAKER TILLY

Baker Tilly is a top ten advisory tax and assurance firm with 90 years of history. As a global operation with a reputation for integrity and growth, the Baker Tilly name is well known in the development industry. Improving their organization's efficiency in reporting was critical to moving their organization forward and securing new clients, but implementing a new system in a large organization can come with challenges.

CHALLENGE

The Baker Tilly team needed to modernize their tech stack to reduce time-consuming, manual tasks like compiling draw requests and managing data silos. Accounting software alone couldn't support their full workflow, leading to time-consuming reconciliation and risk of errors. Baker Tilly recognized the need for a comprehensive solution to reduce risk and allow the accounting team to focus on higher-level objectives and better serve clients.

BAKER TILLY CASE STUDY

SOLUTION

To maintain the high value Baker Tilly delivers to clients, the accounting services team needed a more efficient system that would enhance their productivity and set their services apart. Jennifer Lamb, Senior Manager, Client Accounting Services, Real Estate, alongside her team, transformed Baker Tilly's accounting processes by implementing Rabbet. The goal was not just to save time but to automate manual tasks and eliminate duplicative reviews, allowing her team to focus on serving clients. With Rabbet, the once tedious draw process became automated, saving the accounting team tens of hours per project that were previously spent on budget tracking and draw packaging. The platform's integration with their existing accounting system allowed for seamless document management and real-time project updates. Now, Baker Tilly's team spends less time on back-office tasks and more on building client relationships, all while serving more clients without needing additional staff.

KEY RESULTS

- ▶ Automated draw processing saved hours per project and eliminated time-consuming manual tasks
- ▶ Minimized manual data-entry risks and eliminated the need for extensive reviews
- ▶ Real-time project updates and streamlined client reporting for more accurate and timely insights
- ▶ Time savings and reduction of manual tasks allow team to focus on delivering value to their clients

“Rabbet has completely eliminated the need for the onerous draw creation and manual reconciliation process. We have way more time to spend on strengthening client relationships.”

Jennifer Lamb, Senior Manager of Client Accounting Services, Baker Tilly



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