



Welch LLP uses advanced tools to deliver superior client service

-  **Compliance and Advisory Services**
-  **Tax Practitioners**
-  **North America**
-  **350+ Employees**

The Client

Welch LLP is a North American Chartered Public Accounting firm with deep community roots.

Established in 1918, Welch LLP helps private enterprises, government organizations and not-for-profit businesses with a range of accounting, tax and advisory services.

When Zoran Vranjkovic moved into his role as the Tax Director for Welch LLP, he immediately began to seek ways to streamline processes and access solutions designed to boost efficiencies within the full-service accounting firm.

The Objective

The 350-employee firm faced a heavy workload during the pandemic, and employees tended to get bogged down by case law research. As quickly as possible, Vranjkovic wanted to find a simplified route to streamline the firm's approach to their tax compliance and planning practice.

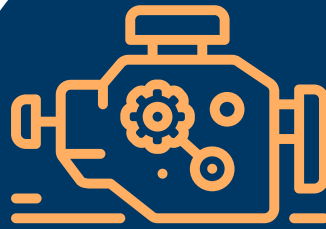
Compliance is always a key focus for the firm, and they felt there was an opportunity to leverage technology to enhance how they worked with clients. That's when Vranjkovic decided to sign up for Blue J.

Clients may have certain assumptions going into an issue, and Blue J's reporting capability has helped provide objective, data-driven support for the position we are taking and our response to the client.

**— Zoran Vranjkovic,
Tax Director**



Conduct efficient, cost-effective research



Prediction tool predicts scenario outcomes with 90% accuracy



Find relevant decisions in minutes, not hours

How Blue J Tax Helped

1. Find key insights faster than ever

"Our compliance team is coming across issues on a daily basis," he says. "Because it's more of a commoditized service, and it's difficult to bill more than you have in past years, we saw Blue J as being able to help get that research into those issues done much more efficiently and cost-effectively."

His team was also impressed when they applied the unique Decision Finder tool, which allows users to narrow scope of research upfront. "So rather than looking at 10 different cases, and trying to figure out which one fits your fact pattern the closest, Blue J allows us to narrow it down to what's actually on-point. Right from the beginning, I think you have a more efficient research process," Vranjkovic adds.

2. Research validation

Like many other Blue J users, Welch LLP found the tool to be convenient in validating their instincts and assumptions for any given scenario, while also assisting with client discussions.

"Clients may have certain assumptions going into an issue, and Blue J's reporting capability has helped provide objective, data-driven support for the position we are taking and our response to the client,"

Vranjkovic says. "The sensitivity analysis of the specific facts is particularly useful, because we can adjust the assumptions around the facts and see what happens to the expected outcome, instantly. It allows us to focus or tailor our arguments or what facts we are presenting."



3. A competitive edge through innovation

Ushering in innovative technology to streamline processes is top-of-mind for many firms, from accountancy to law. In a Gartner Research survey, hundreds of legal professionals were asked last year: "Thinking about your firm's future investment in technology (both financial and time), how do you think any investment should be prioritized for maximum impact?" The top answer? "New investment into tools that automate/improve efficiency."

Welch LLP channeled that intent into a technology investment rippling to many senior members of the team.

Vranjkovic says, "If we can do the same work in less time, with better recoveries, everyone is happy. It's a competitive market, and we want to be able to deliver great service and the right answer in a timely fashion. If we can do that with fewer resources, it's a win-win for us and the client."

In the past, you weigh factors based on a gut feeling. But the prediction engine provides you with a percentage, and that validates your instincts in a tangible way.

**— Zoran Vranjkovic,
Tax Director**