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Brenda Jayne, CFO, Aronson.
There’s a technology race in the sector, driven from the top 25 firms, many of which utilize Star software themselves and we’re determined to keep up with the pace of change. Having an effective practice management system in place is essential to remain competitive and offer the best level of service to our clients, make our people’s lives easier and protect profitability all at the same time.”

For more than half a century, Aronson LLC has purposefully expanded its service offerings and deepened its industry specialties to better serve the needs of its clients and people.

The highly respected firm based in Rockville, Maryland has a clear mission: provide opportunities for its people, contribute to the success of its clients and enrich its communities. Core values of integrity, commitment and excellence underpin all of Aronson’s activity, inform decisions and define the corporate culture. These values are pivotal to the firm’s success and have helped secure multiple accolades, including Inside Public Accounting’s and Accounting Today’s 2019 Top 100 CPA Firms, The Washington Post’s Top Workplaces and the Washington Business Journal’s Best Places to Work. With this context in mind, it was unsurprising that when Aronson’s contract with their incumbent practice management software provider was up for renewal in 2008, the firm chose to assess the rest of the market.

Key drivers for change included the inability to effectively analyze time, expenses and billing data. Aronson also wanted to adopt a more efficient approach to managing back office processes. Brenda Jayne, CFO at Aronson, explains: “Our old system was effectively holding data hostage. Sure, we could input data but trying to analyze it and run meaningful reports was near impossible. It also necessitated a very paper heavy, manual process, where WIP days would involve reams of paper being printed, stapled together and physically transported through the building to obtain approval from various people and departments. We had an opportunity to see if it was possible to do things better and we took it.”

Aronson needed a system that could facilitate paperless billing and create automated, customized reports, pushed to team members and department heads via email to streamline workflows and promote continuous improvement. The new system would also need to integrate seamlessly with Great Plains (now known as MS Dynamics GP).

After reviewing four practice management systems, and upon receipt of a positive referral from a fellow Praxity firm that had recently become one of the first US firms to implement Star’s software, Aronson shortlisted Star.
Keen to do more than receive a standard system demo, Aronson devised an innovative ‘bake off’ style test, where vendors were invited to follow a specific script and demonstrate their systems’ ability to process the same series of transactional steps. Scoring highest against Aronson’s selection criteria, sailing through the ‘bake off’ process and best reflecting the firm’s culture and values, Star was selected in February 2008.

Opting for the core Time and Expenses and Billing modules for starters, Aronson completed the implementation process a few months later. Brenda comments: “Selecting Star wasn’t just about the software, which needed to be designed for CPA firms of course, but also tailored to our own unique requirements, it was about finding the right match in the vendor too. Star’s people, like our own, clearly had a passion for doing the best by their clients, which provided reassurance that we would be well looked after beyond the initial implementation phase. They took the time to learn about our business, how we operate, the challenges we face and what we specifically wanted to achieve. The team also demonstrated shared values; giving us confidence that they could deliver our vision.”

Once live, Star’s intuitive Time and Expense entry modules helped Aronson to capture the maximum amount of time and rechargeable expenses for every job, resulting in improved billing and recovery. It provided a platform for users to process client and non-client related expenses, through the firm’s defined workflow for approval and reimbursement. Likewise, Star’s Billing module made it easier for users to identify billing opportunities, which contributed to faster bill generation; supporting enhanced cash flow. The Billing module also automated several processes, including fee forecasting and repetitive bill generation and helped to create more robust approval processes.

Perhaps most importantly, Star’s software opened a whole new world of possibility to Aronson, in terms of its ability to scrutinize data to better understand operational performance, as Brenda explains: “Drilling down into data via customized reports helps to shed light on how we’re performing. If we haven’t hit budget for the month, I want to know why immediately, not analyze spreadsheets manually for days on end. With Star, we have data, and the insights it possesses about our business, at our fingertips through Microsoft’s SSRS Report Writer – available to us at the click of a mouse, via a series of custom reports. This has made a huge difference to the firm’s management, as have the automated email notifications that are pushed out at...
various times during our monthly billing cycle to ensure people are meeting their responsibilities.”

Fast forward 10 years and Aronson’s evolution as a business was driven strongly by technology, as Laura Silva, the firm’s applications project manager, explains: “Everyone wants to be able to do things faster and more efficiently. Modern working practices also mean we have more people working remotely. To maintain a competitive edge, and offer clients the best level of service possible, while making our people’s working lives easier, our technology infrastructure has had to adapt to keep pace.”

Laura continues: “For years, Star software played a significant role in helping us operate more effectively but to future-proof our business and increase productivity further, we recognized the need to automate more processes and introduce Mobile functionality, so our people could perform tasks on the go.”

In January 2018, Aronson replaced its Windows-based Time and Expenses module with Star’s web-based equivalent; a more current version offering a cleaner, user-friendly interface and several additional features, such as Calendar view and the ability to ‘pin’ time entries, copying line entry from a previous timesheet to a current one.

Determined to remove paper from the expense reporting process, Aronson introduced Star’s Time and Expenses Mobile app, native on iPhone and Android. This has created a paperless expenses reimbursement system, where Aronson’s people can upload expenses receipts from photos taken on smartphones to the web module for paperless approval. This is something that Brenda claims has been widely embraced throughout the organization and is proving especially popular with Aronson’s managing partner, Larry Davis. Time can also be logged through the app, which better supports employees in the field.

A final aspect of the upgrade was the development of custom client workflow functionality, using Star’s Workflow Automation module, incorporating TaskCenter. This enabled Aronson to schedule recurring reports and enhance workflow efficiency, when setting up new clients and engagements in Star. Using workflow automation facilitates fast and efficient approvals at the partner, quality control and Star administrator levels by providing a prompt email when an approval action is required. Email notifications for

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partners and QC personnel include embedded links to web forms that can be reviewed and approved with just a few clicks. This not only helps to speed-up the workflow but also removes duplicated administration, as the workflow integrates with Aronson’s document management and electronic workflow system, GoFileRoom.

According to Brenda, this functionality has undoubtedly improved productivity. “Before, our process of setting up a new client relied heavily on paper. Team members would complete forms by hand before Executive Assistants (EAs) would key the information into SharePoint. Multiple people would then manually type the same data into multiple systems. With Workflow Automation, EAs can input directly into Star, which triggers an email approval notification to partners and populates our other systems too. This has optimized the workflow considerably, while reducing admin intensity and promoting enhanced productivity, especially for our time and billing manager!” Echoing Brenda’s sentiments, Laura believes that Workflow Automation brings other benefits too. “It’s not just the vastly reduced administration burden that’s helping us increase productivity. With the single entry, automated workflow, we can get client numbers assigned and ready to charge time to much more quickly. Clients are now opened on the Star system within hours. Before it could be within the same day at a rush but was typically the next day or two. To track time in the interim, we’d resort back to paper and then key-in retrospectively, which caused yet more work.”

Now using Star’s web-based practice management software to further streamline time entry, billing and expenses reimbursements, as well as create around 50 customized reports, such as A/R and WIP aging, reconciliations, utilization and productivity, Aronson’s core back-office functions have become well-oiled machines. Star’s integration capabilities with Aronson’s document management and workflow, CRM, performance management, HRIS, bookkeeping and Excel files has been key to this.

Replicating the direction of travel of big industry players and future-proofing Aronson’s operations were primary motivators behind the upgrade, as Brenda explains: “There’s a technology race in the sector, driven from the top 25 firms, many of which utilize Star software themselves and we’re determined to keep up with the pace of change. Having an effective practice management system in place is essential to remain competitive and offer the best level of service to our clients, make our people’s lives easier and protect profitability all at the same time.”

“It’s evident that Star is committed to investing in new technology and engaging with its customers to continually improve its awareness of the challenges we face. Crucially,
through initiatives like the annual user groups, Star incorporates customer feedback and insights into its product roadmap. This gives us confidence that Star will continue to be our primary, backbone system regardless of what the future has in store.”

Looking to the future, Aronson plans to continue increasing the efficiencies of its mission-critical back office functions. One of the ways the firm hopes to do this is by expanding its use of Workflow Automation, customization of its Star Dashboard, to further improve reporting capabilities, and by migrating to the Web Billing module. Introducing mobile approvals is another, longer-term objective.

Aronson is also evaluating Star’s Scheduling and PTO modules in a bid to reduce duplication and reliance upon other systems, as Laura confirms, “The advantage of moving to the PTO module is that our leave request and accrual tracking will be in the same system as time entry. Users will have easy access to actual balances in the same system that they work in every day to enter their time. We can also leverage Workflow Automation to semi-automate the PTO request and approval process, which is an appealing concept.”

Laura continues, “What we like about the idea of implementing the Staff Scheduling module is the single database connection with Time Entry and Staff Budgeting, which we already use in Star. We would be able to avoid duplicate entry of jobs in two different systems. We would also expect increased efficiency and ease of use by working in one application for time entry, budgeting and scheduling, as opposed to working in multiple applications.

“One of our core values is excellence and this is what we’re striving to achieve. We’re always looking for new ways to improve and with Star’s in-depth knowledge of the accounting sector, accompanied with their intuitive, constantly evolving software and around the clock support, we’re confident Aronson will continue to live and breathe this value.”

Summarizing Aronson’s 11-year partnership with Star, Brenda concludes: “Back in 2008, we were only the third US accounting firm to put our faith in Star software. Some might say selecting a UK vendor with only a few customers in the States was a gamble but for us it’s one that has most certainly paid dividends.”