# BDO

## OVERVIEW

# BDO Boosts Client Performance with Next-Gen Service Management

*BDO Canada saw the opportunity to address the rapidly growing technology footprint of its advisory services. SysAid was the reliable, cloud-based one-stop-shop they needed.*

## ABOUT

BDO Canada is a leading provider of professional services to clients of all sizes in virtually all business sectors.

BDO delivers a comprehensive range of assurance, accounting, tax, and advisory services, complemented by emerging technology savvy and deep industry knowledge gained from nearly 100 years of being connected to local communities.

With over 125 offices across Canada with 4,000+ employees, teams work collaboratively to offer insights with both regional and national perspectives.

*"SysAid provides BDO Canada with a comprehensive solution to manage our entire backlog from start to finish across our operational client base."*

**Austin D'souza**
National Practice Lead - Solutions Operations

# Scaling operational needs

With knowledge of industry issues, regulations, and market dynamics, BDO Canada provides tailored guidance for projects like enterprise resource planning (ERP), modern workplace, data and analytics, cloud services, and cybersecurity, among others.

BDO Canada's technology service line is a growing area for the firm's advisory practice. Acting as an extension to clients' teams, the BDO Managed Services team provides operational support across the tiers of data, applications, infrastructure, cybersecurity, IT, and technology staffing. The range of services BDO Canada provides positions it as a one-stop-shop for clients in the marketplace.

With hundreds of clients to serve, the team at BDO knew that manually managing and tracking the service requests was not the answer. Managing service levels, auditing capabilities, and reporting would serve as ongoing challenges as the practice grew. BDO realized a mature system was needed that could handle its operating activities and client demands efficiently.

# Servicing a fast-growing client base

In addressing the challenges of managing client services, BDO Canada placed an emphasis on finding a cloud-based, centralized service management system. This would allow the firm to organize its services more effectively, provide those services more consistently, and streamline critical workflows to support clients.

After a detailed evaluation, BDO found that SysAid was the best IT service management (ITSM) solution in the marketplace that fit their requirements.

Currently, over 600 BDO Canada clients are supported through SysAid, with 130 dedicated BDO administrators. The firm directly provides these businesses with ITSM and technical support, including handling incidents and requests. BDO Canada also customized request workflows to ensure clients can manage their transitions more effectively.

Initially, SysAid was implemented to support one technology service line. Subsequent to that success, the system was rolled out across other service lines at BDO Canada as well.

Austin D'souza, National Practice Lead - Solutions Operations for BDO Canada, noted that the ease of implementing SysAid meant the solution's impact was felt right away.

> **It really is a turnkey solution, considering how quickly you can set up and get rolling, he notes.**

The operations team often sees upwards of 500 tickets from BDO clients each month via email or the self-service portal. They also created internal workflows and service queues, working through SysAid to communicate and share updates with clients.

In addition, the firm is using SysAid to monitor its technology service activities, which is extremely important for any large advisory organization. In part, this is made possible with SysAid's calendar feature, as well as the marketplace of integrations that aid in planning, execution, and time tracking.

# Turnkey success

**The centralized SysAid solution introduced changes at BDO Canada that immediately helped to improve its advisory services, provided its clients with greater transparency, and revealed performance optimization opportunities.**

With SysAid, BDO Canada is able to coordinate activities among all the employees serving its large client base. Every client gets the same level of service, at all times, and can access BDO Canada's SysAid-supported services from virtually anywhere.

BDO Canada can provide clients with a clear picture of what's happening using SysAid's reporting and analytics. This includes identifying what advisory services the BDO Canada team is utilizing each month and how much time is spent in doing so.

In addition, SysAid data allows BDO Canada to identify root cause trends, where bottlenecks arise, employee response times, and more. Most recently, BDO Canada started tracking its mean time to resolution (MTTR) and leveraging analytics to identify strengths and opportunities for improvement. With these insights, the firm is constantly focusing optimization efforts where they will be the most effective.

SysAid provides BDO Canada even deeper insights through the Power BI integration that extracts key performance indicators (KPIs) for use in Microsoft's Power BI dashboards. The KPIs measured based on SysAid data include: incoming, closed, and backlog volumes, response and resolution times, root cause distribution of items, and categorization of issues.
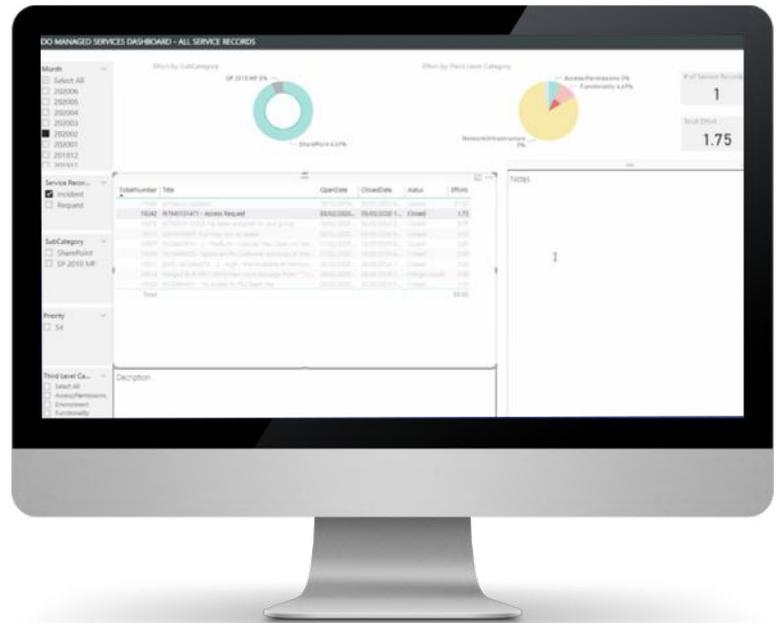


*Dashboard providing a detailed overview of all incidents and requests*

Austin said that the integration was "very easy to use and it streamlined the process of creating performance reports for our clients."

**Exporting the data and configuring it for presentation in Power BI went from a six-hour project to a matter of minutes with SysAid's Power BI integration.** BDO Canada can now provide its clients both periodic reports and on-demand updates with detailed and near-real-time performance information.

The rich business intelligence the company derives from SysAid includes market-level IT service benchmarking and data on BDO Canada's positive impact on clients' businesses.

*Using SysAid's Power BI integration, BDO Canada can present incoming, closed, and backlog volumes, root cause distribution of items, and more at a single glance.*

FUTURE PLANS

# Immediate goals with an eye on the future

## *Encourage self-service portal adoption*

*Currently, BDO Canada is working on increasing client use of the SysAid self-service portal. They are promoting it to give clients greater autonomy in resolving issues themselves using the built-in knowledge base, as well as providing visibility into previous incidents and requests that have been submitted and resolved.*

## *Change management for effective organizational change*

*The company also intends to roll out more change management processes across its technology service line. This will further optimize BDO Canada's support processes and provide its clients with greater transparency*

## *Improve client satisfaction*

*BDO Canada will be leveraging SysAid in an initiative to track client satisfaction. This will include integrating SysAid with a third-party tool for soliciting, collecting, and tracking feedback.*
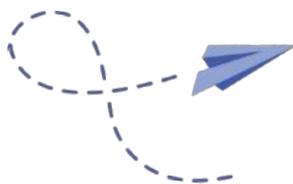


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