

Automating New Hire Provisioning

Wilson delivers innovative workflow and data integration software, and implementation services that make provisioning a pleasure

Is Your Firm Ready to Finally Fix Provisioning Pain?

It's no secret how painful it can be to set up new practitioners and staff with accounts and access to the software and systems they need to do their jobs. It's just surprising how complicated and time consuming it typically is – dependent on cross-departmental collaboration among IT and administrative staff to manually execute a complex series of application updates. And it's similarly burdensome to unwind things when individuals leave the organization, taking care to quickly block access to sensitive data.

In a perfect world, every person who joins your firm would be completely provisioned on day one, without overwhelming support staff with administrative overhead. Today, Wilson is delivering that world, offering intuitive software that connects process, systems and data – and decades consulting experience making it all work in practice.

The Wilson Solution – Software and Consulting Delivering Real Results

Wilson Allen is the exclusive **Intapp Integrate** and **Intapp Flow** resale partner for the accounting industry. Together, these information and workflow management solutions enable firms to streamline provisioning process execution and data propagation.

Tested and proven, Intapp solutions have been adopted by over 1,500 professional services firms globally, comprising hundreds of thousands of users. And with expert implementation provided by Wilson Allen, including hands-on training designed to enable client self-sufficiency, organizations can achieve unparalleled provisioning performance without costly, time-consuming custom coding or software development.

Instead, firms can quickly and easily automate the creation and configuration of user accounts in real time – triggered by updates to defined source applications (e.g. workflow, HR, identity management) – and populate user data in repositories including internal directories and even public website profiles. And much, much more.

Understanding the Roots of Provisioning Pain

Once a new partner or new hire officially join the firm, HR updates its employee database and the provisioning process begins. It's a routine frequently fraught with inefficiency and risk, involving:

Ad Hoc Communication

Email-driven, unstructured requests, replies, and reminders increase complexity and can be overlooked.

Untracked Task Management

Without a system to submit, track, or monitor execution, sticky notes often serve as a poor substitute.

Manual Data Propagation

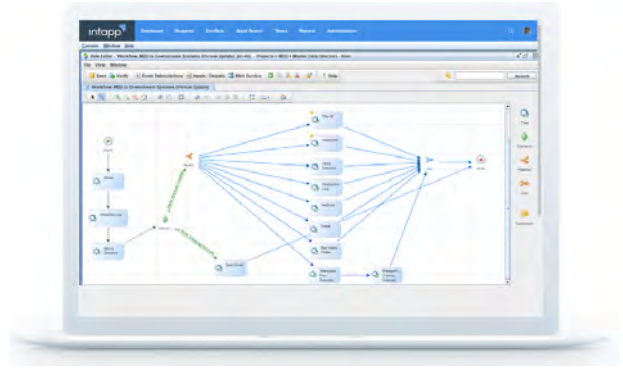
Lack of system integration forces updates to performed by hand, causing delays and human error.

Greater Efficiency, Visibility, and Control – All At Scale

Not only does Wilson Allen enable firms to modernize and automate provisioning by increasing end-to-end efficiency and speed, but we also provide firms with greater visibility, control, and flexibility for managing the process throughout execution.

Orchestrated via a single, unified workflow dashboard, provisioning processes can include defined email notifications, updates, and alerts, including issue escalations. And detailed logs maintain comprehensive records for assurance and traceability.

Additionally, an intuitive graphical interface for connecting applications makes it easy to modify rules and control data flows over time, so firms can effectively manage changes with ease including updates to user details and access rights, and even integrate new systems as the firm's application portfolio evolves.



Rapidly connect, centrally manage and provision:

- HRIS
- Identity management
- Document management
- CRM and marketing
- Time and cost tracking
- Proforma and billing
- Finance and practice management
- Email and collaboration
- VoIP and telephony
- Budgeting and resource
- Cloud and custom systems

Provisioning Proof in Practice – Firms Finding Success with Intapp Software Solutions

THE BONADIO GROUP
CPAs, Consultants & More

"Intapp's workflow applications provide us with a straightforward way to further streamline our IT architecture and automate key business processes that will enhance the speed and efficiency with which our accountants and advisors can serve and respond to clients."

– Director of Information Technology

**Hogan
Lovells**

"Provisioning new users coming in can be a bit nightmarish... We've been able to ease the burden and reduce the turnaround time significantly through the use of Intapp Integrate."

– Chief Information Officer

STITES & HARBISON
ATTORNEYS

"We've had great success using Intapp Integrate to automate the movement of information critical to firm business process including user provisioning and data quality management."

– Director of Information Technology

William Buck

"Intapp software is providing us with visibility across service lines, enabling us to connect a wide range of software applications via a single interface. Integrating our most critical systems has accelerated workflows and increased efficiency by eliminating duplication, reducing the reliance on paper, and avoiding manual re-entry of data."

– Manger of Information Technology