

## **WIPFLI**<sup>LLP</sup> CPAs and Consultants

**Company:** Wipfli

**Website:** <https://www.wipfli.com/>

**Company Size:** 1,800 employees

**Country/Region:** 41 US offices, 2 India offices

**Industry:** Accounting, Business Consulting

**Company Profile:** Headquartered in Milwaukee, Wisconsin with over 1,800 associates, 41 offices in the United States and two offices in India, Wipfli delivers accounting and business consulting services to a broad set of clients, from individuals to large corporations, in a diverse set of industries.

### **Software Solutions & Deployment Enablers:**

- [Skype for Business Online](#)
- [PSTN Conferencing](#)
- [Skype Operations Framework](#)

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Tom Lenz  
IT Director, Wipfli

Wipfli LLP fosters improved teamwork and delivers personalized client service with Skype for Business Online with PSTN Conferencing, saving up to \$250,000 annually.

“I’ve been at Wipfli for close to 15 years, and our implementation of Skype for Business Online for messaging, presence, and screen sharing is the biggest productivity enhancement we’ve ever made. I can’t think of another solution we’ve deployed that proved its value so quickly.”

Michael Pynch  
Technology Partner, Wipfli

Wipfli evolves their communication and collaboration platform with Skype for Business Online, delivering an enhanced toolset that increases productivity and work associate satisfaction, while strengthening connections with colleagues and clients.

### **Business Need**

Wipfli, a top US accounting and business consulting firm based in Milwaukee, Wisconsin, has over 200 partners and 1,800 associates serving more than 60,000 clients in a range of industries including manufacturing, construction, real estate, health care, and government across the United States. Understanding and responding to client needs and challenges, while embracing a spirit of teamwork and communication, is central to Wipfli’s culture.

Wipfli sees much of its growth through mergers and acquisitions, and with that has acquired various one-off phone systems and conferencing solutions throughout the years. Despite those technologies, their company culture was still anchored in traditional conference calls and outdated ways of sharing information. Partners and associates would email PowerPoint files to each other for content sharing and set up a conference call for audio. It was costly and inefficient. Wipfli committed to stay on the forefront of technology, while providing exceptional, personalized service to their clients and reducing costs. They chose to move to Skype for Business Online with PSTN Conferencing for collaboration and communication.

### **Solution and Benefits**

#### **Streamlining on a single platform simplifies IT and reduces costs**

Wipfli had a variety of telephony conferencing systems and collaboration tools in place throughout their broadly dispersed organization. “The range of systems we had in place often came through entities that merged with Wipfli, and were managed by Office Managers. They required significant time to administer, increased demand on IT, and frustrated users. Skype for Business Online with PSTN Conferencing is allowing us to

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Michael Pynch  
Technology Partner, Wipfli

take advantage of economies of scale and scope," shared Michael Pynch, Technology Partner.

By moving to Skype for Business Online with PSTN Conferencing, Wipfli is on track to eliminate up to 15 legacy services once their rollout is complete. This consolidation will result in a simpler platform for IT to manage, fewer tools for partners and associates to master, and a significant reduction in costs.

Tom Lenz, IT Director, estimated, "Once Skype for Business Online with PSTN Conferencing is fully deployed across the company, we will save at least \$250,000/year in hard costs as contracts expire. We'll also see exponential benefits like increased flexibility and the ease of a single system that individuals utilize across the firm."

### Thoughtful rollout approach highlights value for end users and accelerates adoption

Leveraging the framework, tools, and resources available in Microsoft's Skype Operations Framework (SOF), Pynch and team built a plan for their rollout. They worked through a discovery analysis, conducted a thorough network assessment, set goals and objectives, and brought the right team together, including Pynch as Executive Sponsor to champion the effort across the organization.

When the time came to migrate the first users, they started with key roles in three primary practices: audit, tax, and consulting. "The leadership team and key partners in each of our primary practices understand and embrace what we're doing with technology," reflected Pynch. "Enabling them with Skype for Business Online first helped generate positive momentum and buzz in the organization, and establish credible influencers to further drive adoption."

They readied additional groups in the organization through a combination of user guides, training webinars, and open "office hours" to address work associate questions. They're also developing a self-service resource portal with training modules to empower end users.

### Tools built for a modern, mobile workforce deliver exceptional, personalized service

Skype for Business Online with PSTN Conferencing offers powerful tools to enable the modern, mobile workforce at Wipfli. The company has grown to encompass 41 offices across the United States, as well as 2 offices in India. Pynch highlighted, "With Skype for Business Online we now have the tools we need to be truly productive on both sides of the world, at any time of the day."

Wipfli partners and associates regularly use Skype for Business Online instant messaging, presence, content sharing, and meetings as part of their daily work. "Our partners and associates love the simplicity of joining a meeting. They go to their calendar, click on a link, and they're in." Wipfli teams are also adding video to their meetings with increasing frequency. "In accounting and technology consulting, we primarily sell our knowledge and our time," Pynch articulated. "In group meetings, one-to-one performance reviews, and meetings with external clients, we can easily flip on video sharing and enhance that personal connection that is central to our business." He added, "I went to our partner summit last June, and met an individual that I was so used to seeing on video, that I didn't realize I hadn't met them in person!"

With the addition of PSTN Conferencing they've further enabled mobile workers with the ability to connect to Skype for Business Online meetings from wherever they are

located, even when internet access is unavailable. Pynch shared, "We've decided at Wipfli that our Leadership Team and Board of Directors will be the first individuals exposed to new technology enhancements. Our Leadership Team and Board are now using Skype for Business Online as their sole communication system, and say they will never go back to a traditional desk phone."

"With the enhanced communication of Skype for Business Online, and specifically adding video, you feel present in the same room. The ability to send messages during a meeting enhances the richness of conversations," shared Steve Lipton, Partner and Vice-Chair, Board of Directors. "We have already saved countless hours on the road and created more meaningful interactions within the Firm."

Pynch adds, "Deploying Skype for Business Online with PSTN Conferencing has been a key step in our cloud journey. It helped us unseat legacy telephone systems and collaboration tools, while demonstrating significant cost reduction that's enabled us to move forward. It's a critical component of our overall effort to move to a singular platform for communications across the Firm."

## Looking to the Future

Moving forward with their cloud strategy, Wipfli plans to scale their Skype for Business Online rollout broadly, migrating partners and associates at all remaining sites in the US and India, and supporting adoption efforts through continued training and education. They will migrate to Cloud PBX as part of their next stage effort, eliminating up to 15 legacy systems across their organization.

"The ability to be untethered is critical and will make a big difference for our firm in recruiting and retaining top talent," explained Pynch. "We view Microsoft as a strategic partner for our Firm, and we have continued initiatives we are working on together. We want to be the accounting firm that is best at adopting and utilizing advanced productivity tools, enabling us to also offer those benefits to our clients."

Reflecting on the path that brought them to this point, Pynch shared, "I've been at Wipfli for close to 15 years, and our implementation of Skype for Business Online for messaging, presence, and screen sharing is the biggest productivity enhancement we've ever made. I can't think of another solution we've deployed that proved its value so quickly."