



Just recognized for an eighth consecutive year by *FORTUNE* magazine as one of the "100 Best Companies to Work For," Plante & Moran continues to build on its reputation as a leader in understanding and enhancing the human factors associated with delivering true value to their clients. Leveraging the services and technology of CCH, a Wolters Kluwer business – as key enabling components – Plante & Moran creates an environment dedicated to empowering quality of work life and outstanding client service through better management of the total work experience.

How does one firm keep its commitment to providing excellent client service balanced with the belief that employees deserve a healthy and fulfilling work life?



CCH

a Wolters Kluwer business

The Professional's First Choice

Balanced Work Life

"Frank Moran, one of our founding partners, was dedicated to providing a balance of life for his employees. We look to CCH as a true consultant in helping us increase efficiency and productivity – giving our employees better technology tools that, in turn, allow for what could be called 'better work life.'"

– **Monika Bailey**, Tax Technology Coordinator, Plante & Moran



Technology helps make for a "Top 100" workplace.

Plante & Moran operates 18 offices across four states, as well as one in Shanghai, China. With a staff of over 1,400 professionals, Plante & Moran is the nation's 11th largest certified public accounting and business advisory firm, providing clients with financial, human capital, operations, strategy, technology, and family wealth management services. Throughout its continued growth, Plante & Moran's founding priorities and values have remained intact. The firm takes pride in striving to provide 100% of its clients with unmatched service, while 100% of its staff members realize professional and personal fulfillment.

Being named to *FORTUNE* magazine's "100 Best Companies to Work For" for eight consecutive years is quite an accomplishment given the challenges a firm can face through multiple mergers and ongoing growth. Throughout this past decade, Plante &

Moran has relied on CCH, a Wolters Kluwer business, to help meet these challenges while maintaining an unparalleled standard of excellence. Plante & Moran views CCH as a strategic ally – one who looks at the firm's entire business model, provides a network of peer-to-peer consultative opportunities, and proactively creates a truly beneficial business relationship.

"We have a great relationship with CCH; they are very accommodating and I never feel like I am just getting a standard sales pitch. They want a long-term partnership with their customers and that shows – they truly have our best interests at heart."

– **Monika Bailey**, Tax Technology Coordinator, Plante & Moran

Better “work life” means better staff retention and recruiting.

Plante & Moran relies on the integration that comes with the use of CCH solutions as a way to seamlessly integrate offices, workflow, and processes. The firm understands that the use of multiple brands of software solutions can slow down even the simplest of procedures – meaning reduced efficiency and productivity. But even more importantly to Plante & Moran, it can lead to an unhappy employee which, in turn, can lead to poor client service.

“Once again, it goes back to our founding philosophies. We know that people who enjoy their jobs tend to do a better job. Happy people make really good client service people. The use of good technology simply makes things function better.”

– **Monika Bailey**, Tax Technology Coordinator, Plante & Moran

In addition to providing excellent integration, really knowing that CCH is “always there” is the foundation for Plante & Moran’s continued confidence. CCH is committed to constantly improving the ease-of-use, flexibility, and reliability of its tools and solutions – a practice that hasn’t gone unnoticed by Plante & Moran.

“I sort of look at CCH like the power company. I come in, turn on my computer, and I just know they are going to be there. I don’t ever really think about it.”

– **Monika Bailey**, Tax Technology Coordinator, Plante & Moran

Whether using CCH’s online tools to access client files from home or using the CCH research tools to automatically filter the tax and accounting news of the day, the employees of Plante & Moran find that CCH solutions make for a better work environment, and at times, a better home environment.

Plante & Moran has also noticed that the use of better technology provides a platform for better recruiting. New college recruits are growing up with technology and they want to find technologically advanced solutions that provide added flexibility when choosing an employer. With staffing being a key concern within the tax and accounting industry, it’s no wonder that Plante & Moran uses CCH’s advanced technology, including ProSystem fx® Tax and ProSystem fx® Fixed Assets, as a key selling point to recruits.

“We know CCH has a presence in college tax classes and that’s another reason for our partnership with them. If a college recruit is already familiar with our software, it has a positive influence on their decision to join us. Plus, it often times reduces the amount of training needed for a particular recruit.”

– **Monika Bailey**, Tax Technology Coordinator, Plante & Moran

Plante & Moran Key Data

- 11th largest CPA and business advisory firm in the U.S.
- Provides financial, human capital, operations, strategy, technology, and family wealth management services
- More than 1,400 professionals
- 18 offices throughout Michigan, Ohio, Illinois, Tennessee, and Shanghai, China

Standardization and best practices create a “one-firm” approach.

With multiple offices in the U.S. and in Shanghai, China, standardization has proven one of the biggest challenges for Plante & Moran. With each merger and acquisition comes the need for the constant review and implementation of multiple technologies, platforms, and applications. Plante & Moran is determined that no matter which office a client may visit, each and every Plante & Moran office within the network must look, feel, operate, and function as if they were all located within the same building. And, while the firm might employ different technologies in some areas, it relies on the integrated tools and solutions from CCH, like ProSystem fx Tax, to provide this standardization throughout the entire firm network.

“Even though we have multiple offices, we have this mindset of a ‘one-firm’ firm. Visit any Plante & Moran office and you’ll see the same network and applications – we’ve even standardized how the directories are formed. Our staff and our customers don’t have to relearn how we process a return or research tax issues just because they’re in another office.”

– **Monika Bailey**, Tax Technology Coordinator, Plante & Moran

In addition to standardized procedures and processes, it is equally important that Plante & Moran employ and manage best practices throughout the firm. Again, the firm relies on CCH to help determine what these best practices should be and how they should be implemented. Plante & Moran sees CCH as being unique in this arena because CCH actually provides the opportunity for peer-to-peer networking and communications – allowing Plante & Moran to contact other CCH customers for consulting purposes and even office visits. Whether reaching out for advice or giving it out themselves, Plante & Moran has found these customer collaboration sessions to be invaluable when it comes to setting up best practices – especially when implementing a new CCH solution or service.

“There is a real value in having this customer communication network available. It’s almost like having an informal user group. Just knowing someone else has been down a certain road and listening to how they use a specific application can help answer a lot of questions right up front.”

– **Monika Bailey**, Tax Technology Coordinator, Plante & Moran



Plante & Moran provides unmatched service, and so does CCH.

Though Plante & Moran has had a partnership with CCH for over a decade, like most firms, it is constantly looking at new technologies, services, or applications to better run their business, cut operating costs, and raise customer service to an even higher standard. And while the firm has looked at products from various companies, Plante & Moran almost always find themselves coming back to CCH. This is a firm that understands that the least expensive route is not always the best.

"We're willing to pay a little extra. We know there are less expensive alternatives out there, but we also know that CCH has consistently proven to be the best. Customer service is important to us, and CCH has demonstrated it is just as important to them."

– **Monika Bailey**, Tax Technology Coordinator, Plante & Moran

Plante & Moran has noticed that CCH continuously provides the type of service that a nationally recognized leader in the tax and accounting industry deserves. CCH strives to be a true strategic partner with its customers, wanting to be more than simply a software provider. CCH consistently looks at the entire workflow scope to determine exactly how its ProSystem fx[®] Office and CCH[®] Research solutions are being used and implemented throughout each customer's organization. With Plante & Moran, this type of approach really hits home.

"Most software providers simply want to teach you a specific application. CCH wants to teach you how their solutions can help you accomplish your job – making it better and easier for you on a daily basis. They really take a 'how do you do your job' approach – it really makes a difference."

– **Monika Bailey**, Tax Technology Coordinator, Plante & Moran

Conclusion: Balancing work, life, and outstanding client service – CCH's technology helps make it possible.

Plante & Moran is committed to providing employees an atmosphere that allows them to thrive both professionally and personally. The firm views the use of leading-edge technology as a means to help make this commitment a reality. Plante & Moran uses the workflow software, research tools, and consultative services provided by CCH as part of a foundation for creating a positive workplace experience for all of its 1,400 professionals. Whether using CCH research tools to get daily updates segmented by specialty or industry-served, or using ProSystem fx Tax to seamlessly process returns, Plante & Moran knows that CCH's solutions are helping it provide a better working environment throughout an 18-office network.

Plante & Moran is committed to its founding principles, clients, and staff – and CCH is committed to helping Plante & Moran continue to fulfill its core purpose: "to be a caring, professional firm deeply committed to our clients' success."

"We appreciate good client service because that's what we're expected to give – you have your vendors, and then you have your partners. CCH gets the bigger picture, they offer a true partnership value."

– **Monika Bailey**, Tax Technology Coordinator, Plante & Moran



CCHGroup.com ■ 1-877-CCH-8397



CCH

a Wolters Kluwer business

The Professional's First Choice