



Customer success story: Eide Bailly



About the client

Eide Bailly is a mid-sized accounting firm helping their business clients across all industries with everything numbers—from auditing and assurance to tax and outsourcing. They're among the top 25 accounting firms in the US, spanning 41 cities, with an office in Mumbai.

With so many areas of expertise, Eide Bailly needed a work management solution capable of scaling to their objectives. After 3 years with their older web solution, Program Manager Aaron Abbott and Director of Technology Integration Kevin Fraase started to feel the PPM tool's limitations. Fortunately, a team member was introduced to Workfront at a conference. Then, when WNDYR was recommended to the Eide Bailly team, it seemed like an obvious fit.

The challenges

Eide Bailly's previous implementation attempt was a failure, leaving gaps between teams and individuals. Without expert guidance or accountability in the system, users felt stranded in terms of functionality. Kevin and Aaron admit that with a robust program, such as Adobe Workfront, it's difficult to determine where to start. This time, they wanted to make sure their implementation was a success. That's why they turned to WNDYR.

WNDYR's target solution



More functionality around project management



Stronger resource management



How WNDYR helped

Implementation is hard, but not with expert guidance! “WNDYR’s experienced consultant was instrumental, especially in terms of organization, planning, reviewing, and timing. They were very communicative and responsive, and always accommodating to make time for meetings. Most importantly, the consultant was able to adapt to our specific situation very quickly, which gave us more time to dig into the details.”

What we delivered

- ✓ Guidance around process optimization and work best practices
- ✓ Targeted solutions and adaptability to unique circumstances
- ✓ Definitive answers leading to resolutions and critical milestones



Although we had a strong champion on our side, there are so many specific details and so much functionality that it’s easy to become overwhelmed. It took a strong partnership with WNDYR’s consultant to confirm we were moving in the right direction. Without a confident champion on your team that has experience in implementing PPM tools, purchasing an implementation is going to be even more necessary because you don’t know what you don’t know. Getting that assistance to walk through the tool is incredibly important.

Kevin Fraase
Director of Technology Integration at Eide Bailly

The results

“We’re thrilled with WNDYR! They’ve helped us reach all of our objectives. WNDYR’s consultant was able to either find the answers or supply the necessary resources to help find the answers.”

WNDYR helped Eide Bailly set up their Workfront implementation, enabling them to go live with projects and streamline their processes. After completing the initial configuration, the team was ready to create projects in Workfront. Users were trained and onboarded, roles were set up, and projects were assigned. So far, they’ve had only positive feedback.

While it’s continual work, Eide Bailly’s processes have improved greatly. They’re hoping that Fusion will help to streamline it even further.



What's next for Eide Bailly?

Looking forward, Eide Bailly has several more integrations in the pipeline. And while they scale their systems, they expect to implement Adobe Workfront across their entire firm.

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“As we use the system more, we will find even more utilities, especially with Fusion. We are also looking at Workfront's new capabilities, such as Align & Scenario Planner. Our long term goal is to roll out Workfront firm-wide.”

Kevin Fraase

Director of Technology Integration at
Eide Bailly

About WNDYR

Our global team provides the ultimate service solution to effectively onboard teams into Adobe Workfront.

We bring our deep expertise to assist clients in optimizing their work-flows and partnering with them on a further journey of development inside their organizations.

Contact us at sales@wndyr.com