The Computerworld Honors Program

Honoring those who use Information Technology to benefit society

LOCATION:
Oak Brook Terrace, IL, US

YEAR:
2007

STATUS:
Laureate

CATEGORY:
Finance, Insurance and Real Estate

ORGANIZATION:
Grant Thornton

PROJECT NAME:
Assurance Compliance

Short Summary

The nature of Grant Thornton's business revolves around client service and compliance. As such, the firm has a critical, ever-growing need to ensure intellectual capital and other knowledge is up-to-date and available to its users at all times. In the past, roughly 500Mb of content from internal GT sources as well as external sources (such as the SEC and AICPA) was distributed every month to 3,000+ Assurance professionals. This data was sent in one, large piece each month. Due to the nature of the enormous content distribution and its monthly release schedule, the process adversely affected network performance and forced other, critical firmwide processes, such as month-end accounting close and software patch updates to be scheduled around the push. Grant Thornton needed a way to simplify and streamline this process to limit the amount of data flowing across the network at any one time.

After extensive research and product comparison, GT implemented Afaria, a product from Sybase/iAnywhere, to assist with these issues. The firm is now able to break up the large data source into small, more manageable pieces and to deploy content just-in-time -- as it changes, not every month according to a static schedule.

The solution implemented is now fully internet-based, so no Virtual Private Network (VPN) connection is required. Updates are available anywhere a public internet connection can be obtained. Not requiring connectivity back to the internal GT network frees up a great deal of expensive bandwidth on the firm's network to perform other critical functions (i.e. that of month close and patch management).

Introductory Overview

Grant Thornton's need to simplify and streamline the process of getting compliance and regulatory content out to its Assurance professionals in a more efficient and less costly way led to the implementation of iAnywhere's product -- Afaria. Some of the goals of this project included:

- increase the frequency of content distribution while decreasing the amount of data sent at any one time;
- decrease network bandwidth costs to the firm when distributing content to our Assurance professionals;
- break up a single distribution of 500Mb of content into smaller, more manageable pieces;
- provide an internet-based solution that would not require VPN connectivity; and
- allow silent content updates without necessitating end-user intervention or disrupting work.

The Afaria solution consists of two, major pieces: 1) a centrally managed server/content staging infrastructure, and 2) a small client that runs on each user's desktop or laptop. Using the Session Manager portion of the server, Grant Thornton is able to script content distribution rules and schedules. When employees "check-in" on a daily basis, these scripts are run and check for any new content; if anything is found, the data is updated accordingly and the changes are immediately reflected.

Because of these changes, Grant Thornton has been able to break up our 500Mb distribution into 119 smaller pieces, that, when changed, are automatically compressed and sent out (using byte-level differencing) to all end users. Because of the compression and byte-level differencing, Grant Thornton has been extremely successful in keeping network bandwidth requirements down, delivering the content to users in a much more effective manner that does not disrupt user's work time.

Benefits
Has your project helped those it was designed to help?
Yes

What new advantage or opportunity does your project provide to people?
Approximatley 75 - 80% of Grant Thornton's workforce is mobile and many of them don't always have the luxury of having VPN or high-speed network connectivity. After the implementation of the Afaria project, as long as a user now has access to an internet connection, the content updates will be pushed to him or her. More importantly, however, Grant Thornton is able to push content immediately when it changes and is no longer required to queue changes up to send only once a month. Becuase distributions of content are now smaller, the Afaria product allows users to get more work done as data is being pushed down to the computer.

Has your project fundamentally changed how tasks are performed?   Yes

How do you see your project's innovation benefiting other applications, organizations, or global communities?
The results of this project have great potential to benefit any projects or applications that rely on software/update distribution. Internet-based updating is something that Grant Thornton has struggled with in the past, and now the firm has a solution for it. Above and beyond that, the timely distribution of critical knowledge to its workers benefits its clients. Because client service is the life-blood of its business, successful and efficient engagements are critical. Grant Thornton is only as successful as the tools and knowledge its has allows us to be. Afaria brings this knowledge to Grant Thornton's users faster.

The Importance of Technology
How did the technology you used contribute to this project and why was it important?
Technology was key in making this project a success. Grant Thornton implemented two blade servers: one for the main Afaria application server (Afaria application and content storage) and one for the central management console. Afaria also integrates seamlessly with Active Directory (AD) for permissions, so having AD in place already was a great help to the firm. Technology also played a critical role in helping the firm split up the content from one, huge file with 500Mb of data into many smaller

pieces.

Originality
What are the exceptional aspects of your project?
The exceptional aspects to this project are 1) internet-based software distribution of content for use in an off-line mode, 2) network bandwidth reductions due to smaller package payload, and 3) silent and effective updates to users without an affect on their ability to work.

How is it original?
The most original aspect of this project is the way that it enables Grant Thornton to provide its professionals with real-time information -- ultimately improving its ability to deliver excellent customer service.

Is it the first, the only, the best or the most effective application of its kind?   Most effective

Success
Has your project achieved or exceeded its goals?
Exceeded

Is it fully operational?   Yes

How many people benefit from it?   3000+

If possible, include an example of how the project has benefited a specific individual, enterprise or organization. Please include personal quotes from individuals who have directly benefited from your work.
This project has benefitted the Assurance organization greatly! Grant Thornton's previous attempts to implement this with another technology failed due to installation issues. As soon as the firm installed the software on end-user's computers, they were able to immediately download the content needed to bring them up to date.

How quickly has your targeted audience of users embraced your innovation? Or, how rapidly do you predict they will?
From Grant Thornton's perspective, the wonderful thing about this project is that end users don't even need to know about the implementation. The firm was able to install the client agent on end users' machines and start pushing down

content to them without them even needing to click a single button. In this case, Grant Thornton measures quickness of adoption on the lack of negative feedback the IT department hears!

Difficulty

What were the most important obstacles that had to be overcome in order for your work to be successful? Technical problems? Resources? Expertise? Organizational problems?

The most significant obstacle that had to be overcome in order to get this project off the ground was the extensive work in splitting the Assurance research content for delivery. The firm has thousands of documents embedded into the content it serves up to its users and this all needed to be analyzed and broken up into smaller, relevant, and related pieces.

Often the most innovative projects encounter the greatest resistance when they are originally proposed. If you had to fight for approval or funding, please provide a summary of the objections you faced and how you overcame them.

The only resistance IT ran into when implementing this project was the price of the Afaria software. It was a non-budgeted item, but when we explained 1) the cost savings in relation to what the firm was currently doing, 2) the ability for the firm to be more profitable by distributing more frequently, and 3) the network bandwidth being freed up to reduce bottlenecks for other projects the firm was doing, the approval was given almost immediately.

Digital/Visual Materials

The Program welcomes nominees to submit digital and visual images with their Case Study. We are currently only accepting .gif, .jpg and .xls files that are 1MB or smaller. The submission of these materials is not required; however, please note that a maximum of three files will be accepted per nominee. These files will be added to the end of your Case Study and will be labeled as "Appendix 1", "Appendix 2" or "Appendix 3." Finally, feel free to reference these images in the text of your Case Study by specifically referring to them as "Appendix 1", "Appendix 2" or "Appendix 3."

Currently Uploaded Appendices:
No appendices currently uploaded.

Nomination Information
Nominated By: Sybase
Organization: Grant Thornton
Project Name: Assurance Compliance
Category: Finance, Insurance and Real Estate
Project Description:
As the 5th largest accounting and tax business advisory organization in the U.S., Grant Thornton has found a way to simplify compliance to strict regulations set forth by the government relative to tax updates. As updates are issued, Grant Thornton needs to ensure that these government rules and regulations are current and referencable by their financial advisors at all times. When updates are issued, Grant Thornton adds their own protocol and then pushes these updates out to their 3,000+ advisors across the USA.

In the past, the need to distribute large files has been an arduous and time consuming process as many of the files being transferred were very large and could affect carriers' networks in various parts of the country. The organization has replaced their distribution model to solve this challenge, and ensured that advisors and ultimately clients achieve tax compliance in a timely manner.

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Demographics

What is the estimated annual revenue of your entire company? $500 Million - $999 Million

What is your company's annual IT/IS budget for all IT/IS products? $10 to $49.9 million

What best describes your involvement in the IT purchase process? All of the above

Your Business/Industry: Non-Tech: Other

Your Job Title/Function: IT Management: Manager

Number of employees in your entire company: 5,000 - 9,999

Additional Questions

How do you think Information Technology will be different in 2010?

Most key communications are no longer "store and forward," but "real time." Clients will expect answers now, not tomorrow. Changes within the market are also more fluid and require real time response from trusted advisors. The virtual enterprise continues to take shape. Professionals spend more time with customers than sitting in the firm's offices liking up with the business. We will see continued growth of services to enable an ever-increasing mobile workforce.

As competition increases in the professional services industry, the firms that can successfully extend the greatest value of their enterprise knowledge to their "client site" staff will have a significant competitive advantage. Our infrastructure goals at Grant Thornton LLP are to stay ahead of this challenge by developing and deploying the building blocks that will enable the extension of the mobile workforce.

What does being a part of the 2007 Computerworld Honors Program mean to you?
We are very excited to be nominated as part of this program. Although not related, in the past three years, we have participated in the Computerworld Top 100 Places to Work in IT and have placed 26th, 18th, and 5th, respectively.