

PENDOMONIUM 2023

**Building a
digital customer
experience, guided
by user insight**





Colleen Knuff

Vice President, Product
Management,
Wolters Kluwer



Mustafa Kamal

Lead Technology Product
Manager,
Wolters Kluwer

Agenda

- Insights from analytics
- Elevating onboarding experience
- Unlocking integration benefits



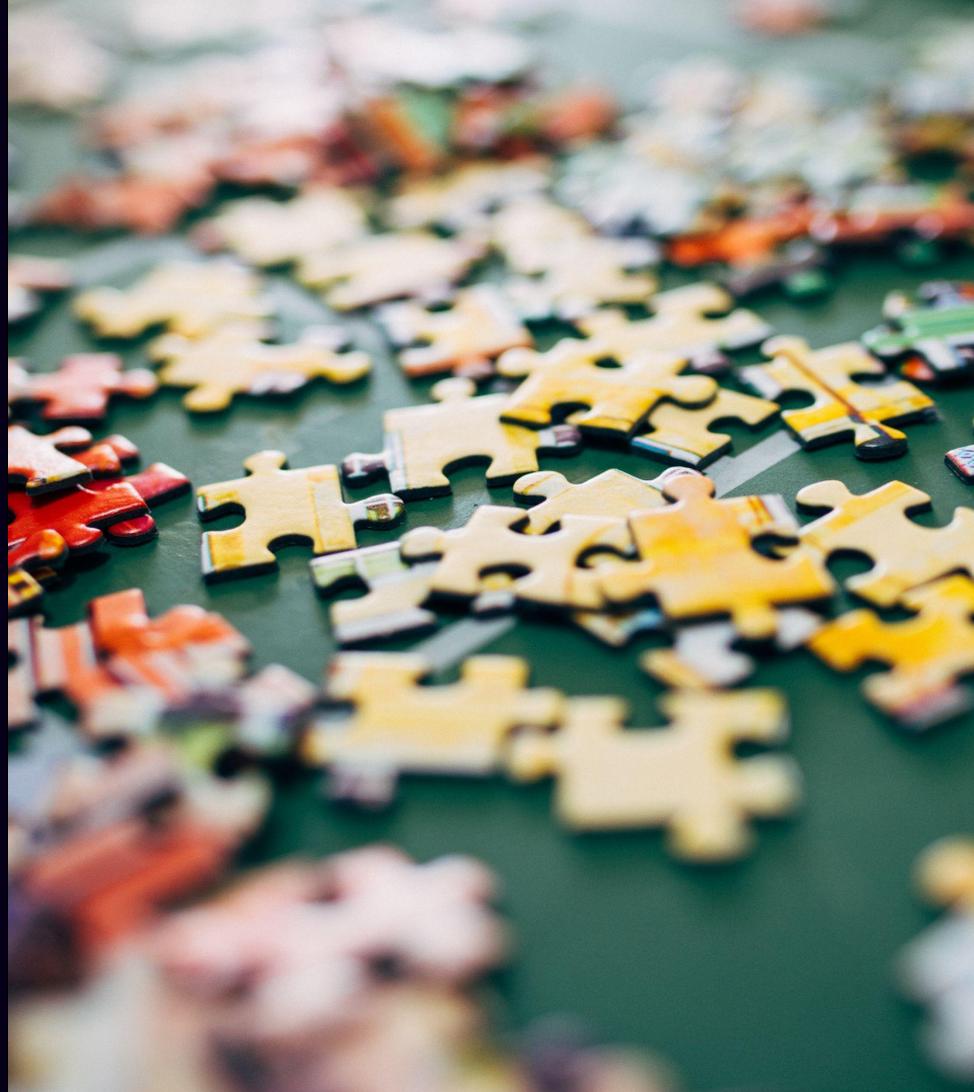
PENDOMONIUM 2023



PENDOMONIUM 2023

Insights from analytics

- **Product Areas**
- NPS
- Segments

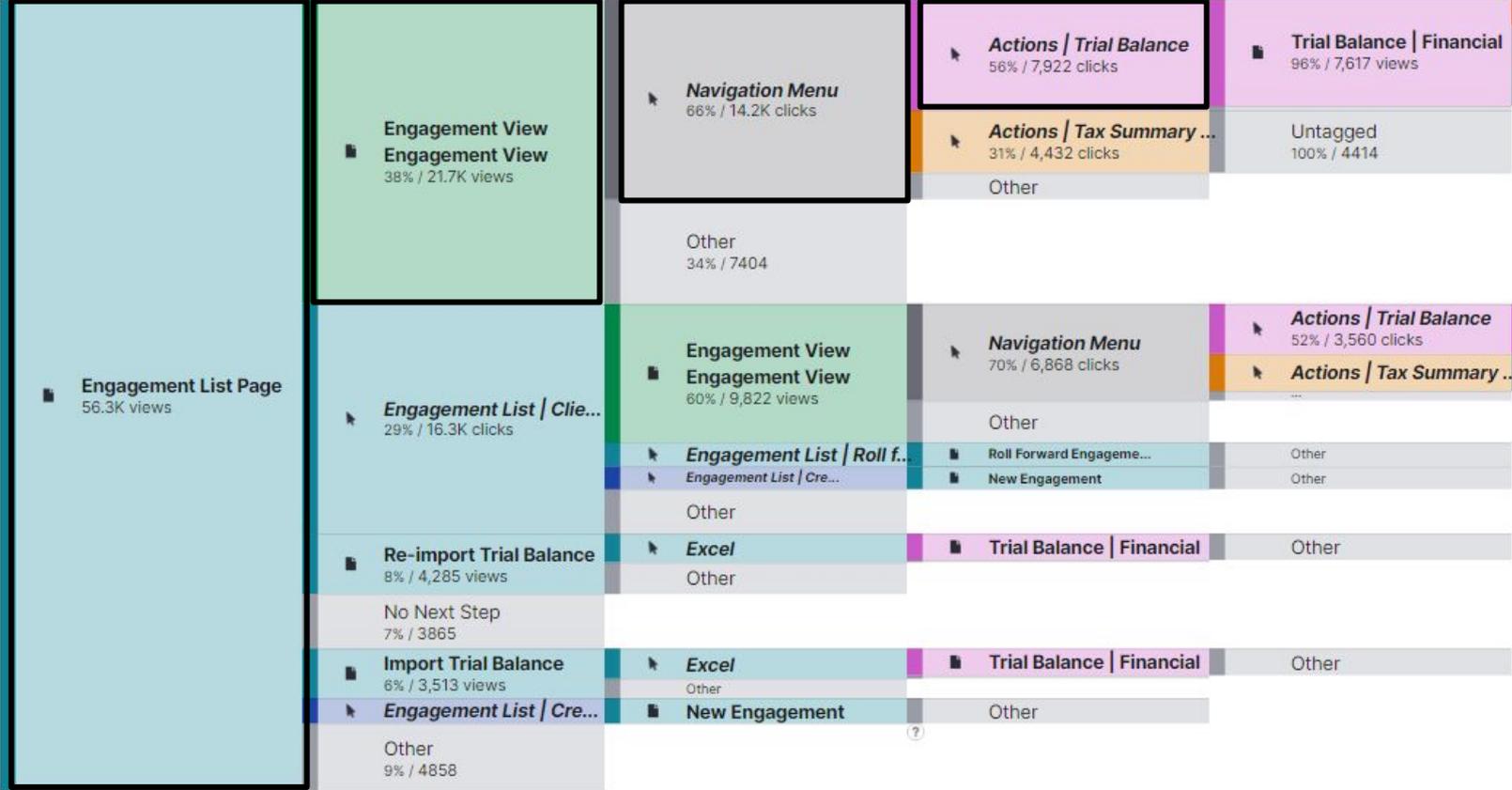


Product Areas



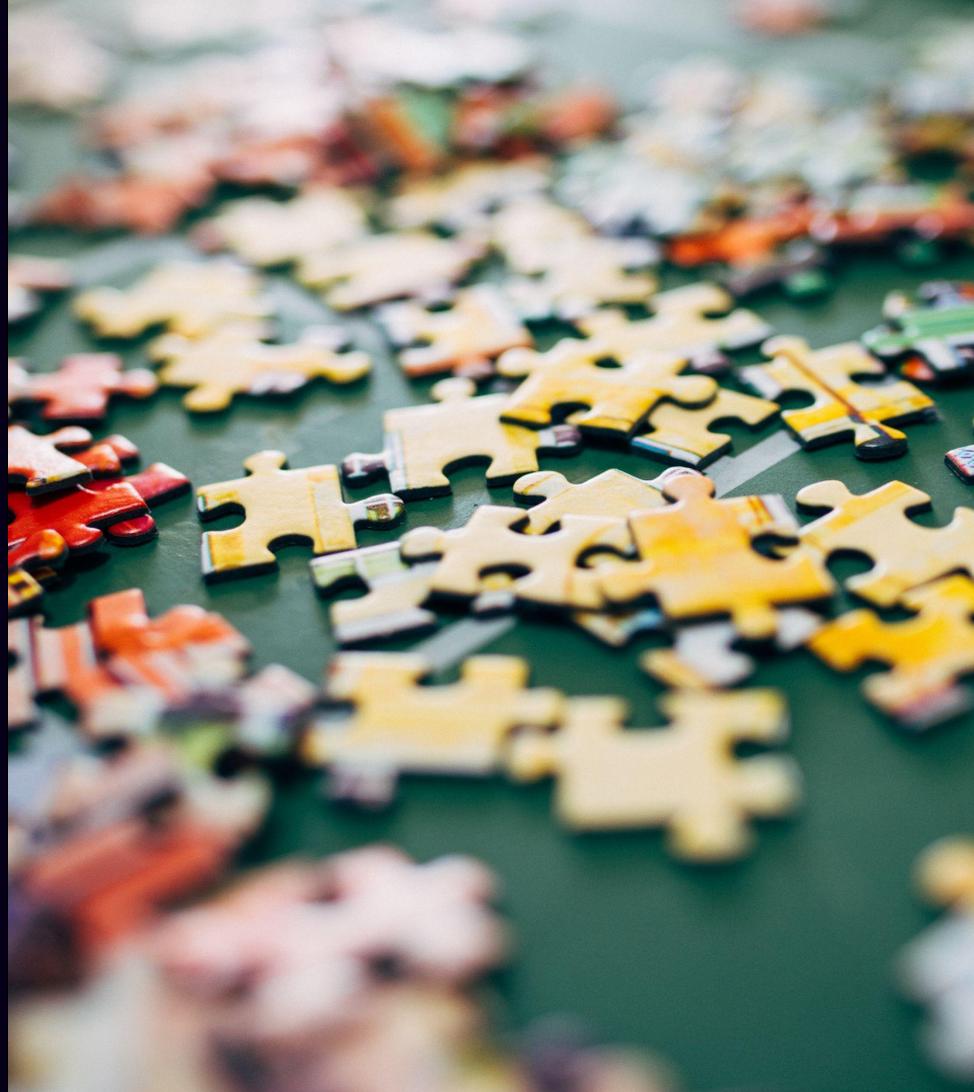
Name	Pages	Features	Page Views	Feature Clicks
Dynamic Tool Pane	10	81	213198	1166099
Trial Balance	7	53	1535118	457078
Banner Icons	0	5	0	239342
Tax Summary Report	1	4	240784	140914
Engagement List Page	4	23	194018	115477
Engagement View	4	21	257143	107248
Create New Engagement	0	58	0	79851
Copy/Roll Forward	0	18	0	51913
Financial Statements	1	1	50390	45820

Product Areas



Insights from analytics

- Product Areas
- NPS
- Segments



NPS



How likely are you to recommend CCH Axxess™ Engagement to a friend or colleague? ×

Not at all likely 0 1 2 3 4 5 6 7 8 9 10 Extremely likely





Journal Entries



AJE RJE TJE PAJE

ACCOUNT NAME	DEBIT	CREDIT
61000 Auto Expenses	\$10,000.00	\$0.00
1	\$0.00	\$0.00
23300 401 K Deductions Payable	\$0.00	\$0.00
11000 Accounts Receivable	\$10,000.00	\$0.00
19150 Accum Amortiz - Organiz ...		
17600 Accum. Depreciation-Bldg...		
17500 Accum. Depreciation-Buil...		
17100 Accum. Depreciation-Equi...		
17000 Accum. Depreciation-Furn...		
17300 Accum. Depreciation-Other		
17200 Accum. Depreciation-Vehi...		
11500 Allowance for Doubtful Ac...		

Do not include



Journal Entries ✕

AJE RJE TJE PAJE

ACCOUNT NAME	DEBIT	CREDIT	
61000 Auto Expenses	\$10,000.00	\$0.00	✕
<input type="text" value="Enter the number or name"/>	\$0.00	\$0.00	
<input type="text" value="Enter the number or name"/>	\$0.00	\$0.00	
TOTAL	\$10,000.00	\$0.00	

[⊕ Add new account](#)

*Journal entry comment



Journal Entries ✕

AJE RJE TJE PAJE

ACCOUNT NAME	DEBIT	CREDIT
61000 Auto Expenses ✕	\$10,000.00	\$0.00
Enter the number or name	\$0.00	\$0.00
Enter the number or name	\$0.00	\$0.00
TOTAL	\$10,000.00	\$0.00

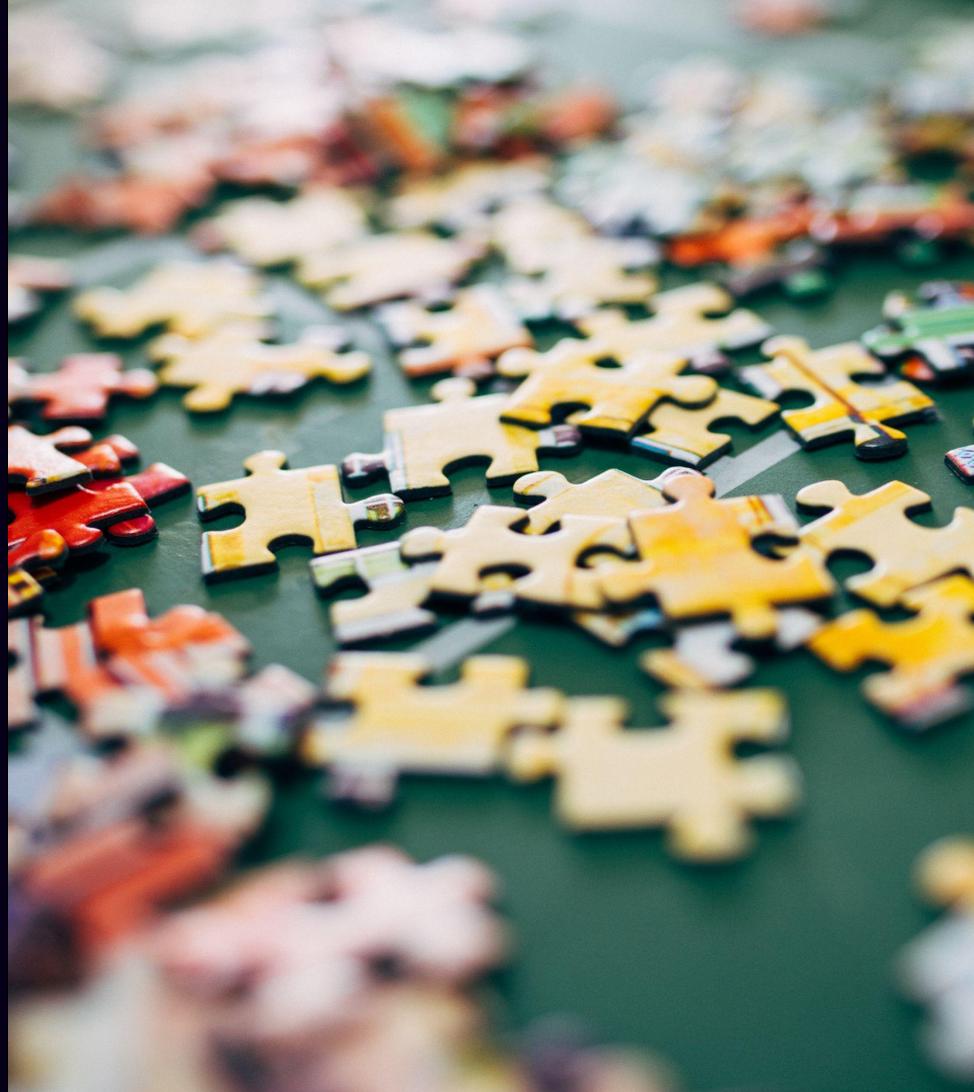
Account number *Account name

✕ ✓

*Journal entry comment

Insights from analytics

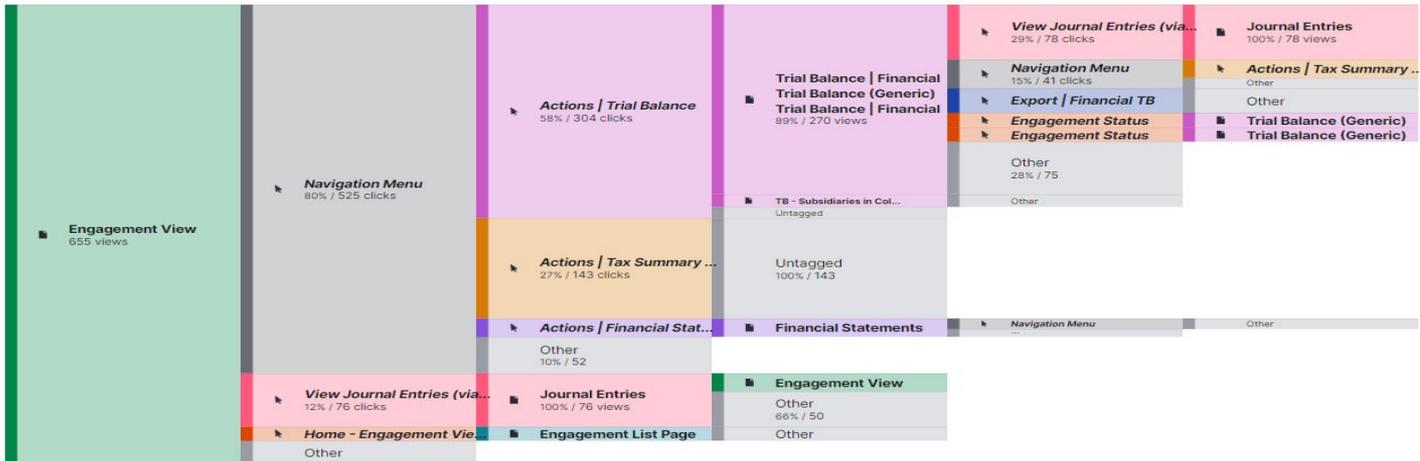
- Product Areas
- NPS
- Segments



Segments

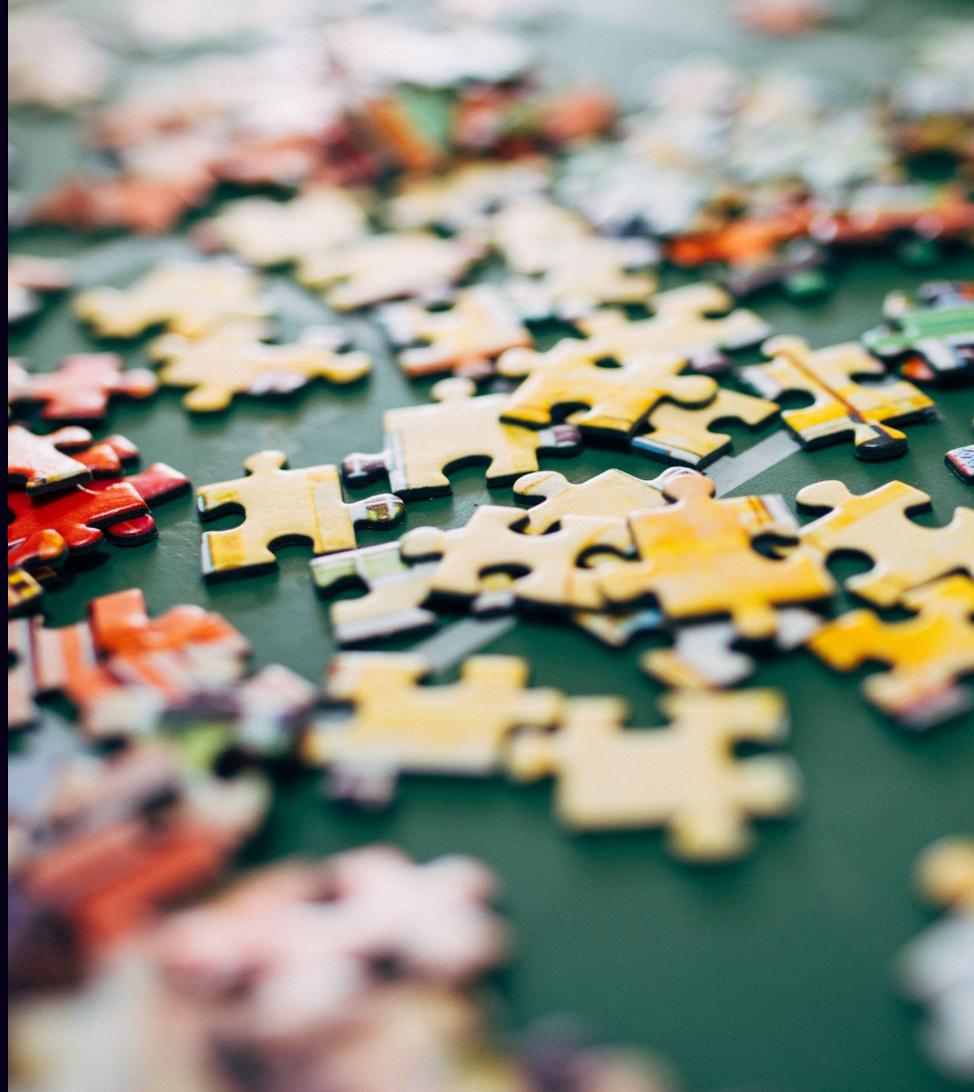


<input type="checkbox"/> Segment name	Last up...	Created...	Rules	Last updated by
<input type="checkbox"/> Lowest Usage Visitors with NPS < 5	Sep 14, 20...	mustafa.ka...	Number of days active is lesser or equal t... + 1 more rule	mustafa.kamal@wol
<input type="checkbox"/> Lowest Usage Visitors with NPS > 6	Sep 14, 20...	mustafa.ka...	Number of days active is lesser or equal t... + 1 more rule	mustafa.kamal@wol
<input type="checkbox"/> Highest Usage Visitors with NPS > 6	Sep 14, 20...	mustafa.ka...	Number of days active is greater or equal ... + 1 more rule	mustafa.kamal@wol
<input type="checkbox"/> Highest Usage Visitors with NPS < 5	Sep 14, 20...	mustafa.ka...	Number of days active is greater or equal ... + 1 more rule	mustafa.kamal@wol
<input type="checkbox"/> Highest Usage Visitors with NO NPS	Sep 14, 20...	mustafa.ka...	Number of days active is greater or equal ... + 1 more rule	mustafa.kamal@wol



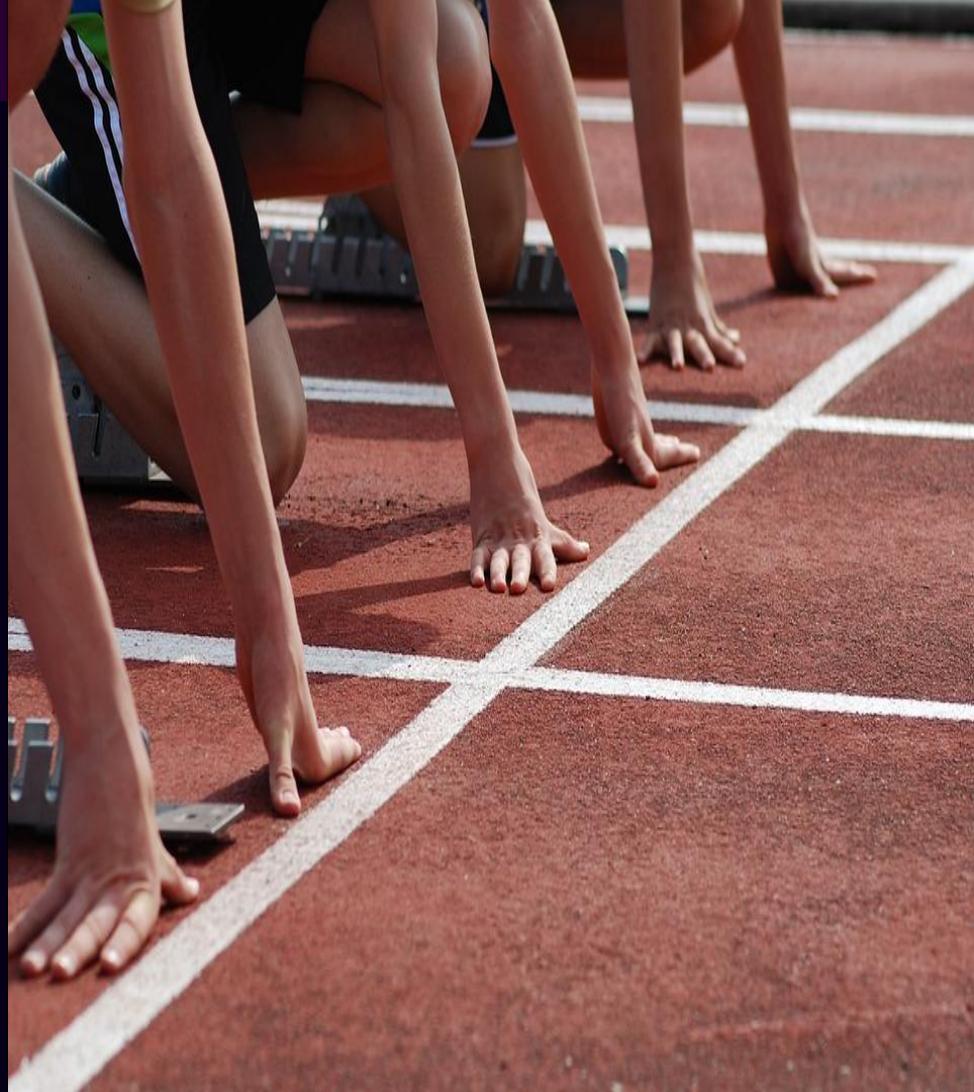
Results

- Track customer journey
- Identify pain points
- Deliver quick wins



Enhance onboarding

- **Walkthroughs**
- **Announcements and Updates**
- **How-To Guides**



Walk Throughs



Wolters Kluwer



GROSS, ABIGAIL

Mustafa's Supplements

CCH Access™ Engagement

Engagement View

Add Folder

Unfiled Workpapers

Unfiled Reports

Unfiled Leadsheets

Tips

	INDEX	NAME	ACTIONS	NOTES	STATUS	ACTIVE USER	PREPARER	REVIEWER
Unfiled Leadsheets								
	1000	Cash & Equivalents Leadsh...	...				+	+
	1200	Receivables, net Leadsheet	...				+	+
	1300	Inventory Leadsheet	...				+	+
	1400	Prepaid Expenses Leadsheet	...				+	+
	1500	Other Current Assets Leads...	...				+	+
	1600	Property, Plant and Equipm...	...				+	+
	1700	Intangibles Leadsheet	...				+	+
	1800	Other Assets Leadsheet	...				+	+
	2000	Payables Leadsheet	...				+	+
	2100	Accrued Expenses Leadsheet	...				+	+
	2300	Other Current Liabilities Le...	...				+	+
	2400	Long-Term Debt Leadsheet	...				+	+
	3000	Equity Leadsheet	...				+	+

Add Journal Entries

Upload Workpapers



PENDOMONIUM 2023

Walk Throughs



Top Stats

3,721

Total Views



1,073

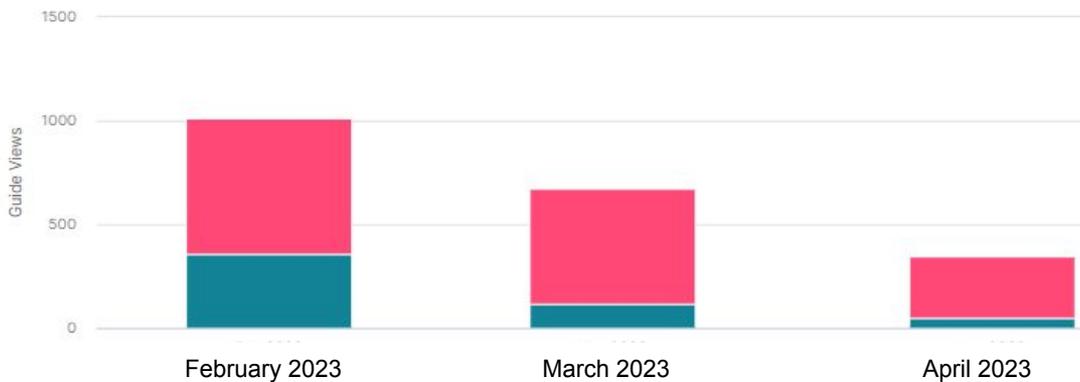
Visitors

of

3,577

Eligible Visitors

Monthly ▾ Views ▾



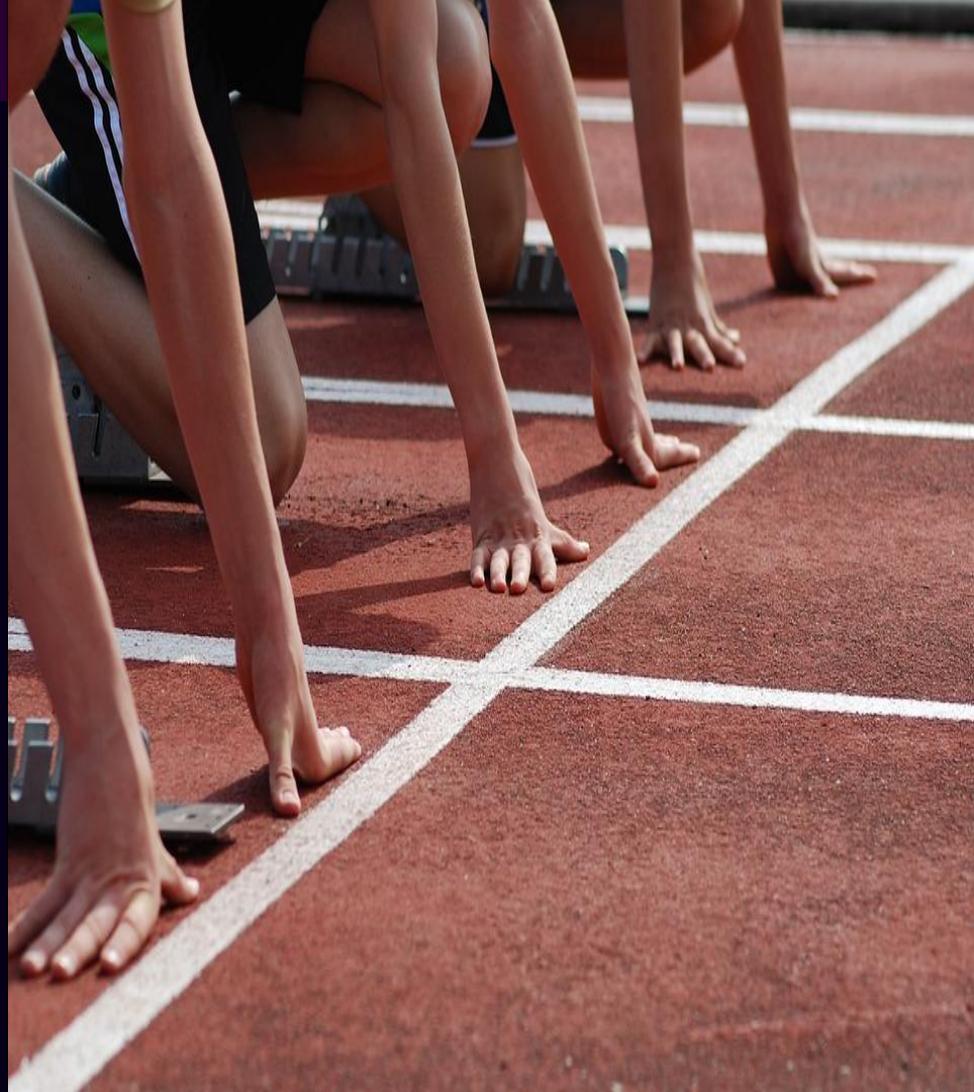
● First Time Views

● Repeat Views

PENDOMONIUM 2023

Enhance onboarding

- Walkthroughs
- **Announcements and Updates**
- How-To Guides



Announcements and updates



GROSSMAN, ABIGAIL	GROSSMAN	12/31/2022	Audit
Version, Helena	Version	12/31/2021	Audit

Maintenance Alert! ✕

An upcoming release is scheduled for August 17, 2023 between 12:00 AM and 5:00 AM CST. Please note that during this time, our servers will be undergoing maintenance, and the application will be unavailable. We apologize for any inconvenience and appreciate your understanding as we work to enhance your experience.

Thank you for your patience

[OK, Got It!](#)

Version, Helena	Version	12/31/2022	Audit
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Announcements and updates



What's New - April 2023

Financial Summary Report - A new report is available which displays the financial groupings including the groups, sub-groups and accounts for all current year balances as well as the prior year final balance.

Engagement Module Status - You can view your firm's licensing information, including the number of engagements the firm is licensed to create, how many have been used and how many are remaining for each licensed module (Essentials, Pro, Knowledge Coach). Click the information icon from any page within Access Engagement to view your license information.

Allow Upload of All File Types - You can upload all file types to be stored as workpapers within the engagement, with two exceptions: EXE and DLL files.

Edit Unadjusted Balance on the Trial Balance - You can edit the unadjusted balance directly on the Financial and Tax trial balances by selecting the pencil icon in the header of that column. This will allow you to make updates to the imported balance without having to reimport.

Copy an Engagement with Knowledge Coach - You can copy an existing Knowledge Coach engagement to create a new engagement.

Add Knowledge Coach to a Pro Engagement - You can add a Knowledge Coach title to an existing Pro engagement through the Engagement Properties.

Edit PDF Workpapers Using the Workpaper Monitor - You can open, perform basic editing and save changes to PDF workpapers directly from within an Essentials or Pro engagement.

New functionality available in Consolidated Engagements:

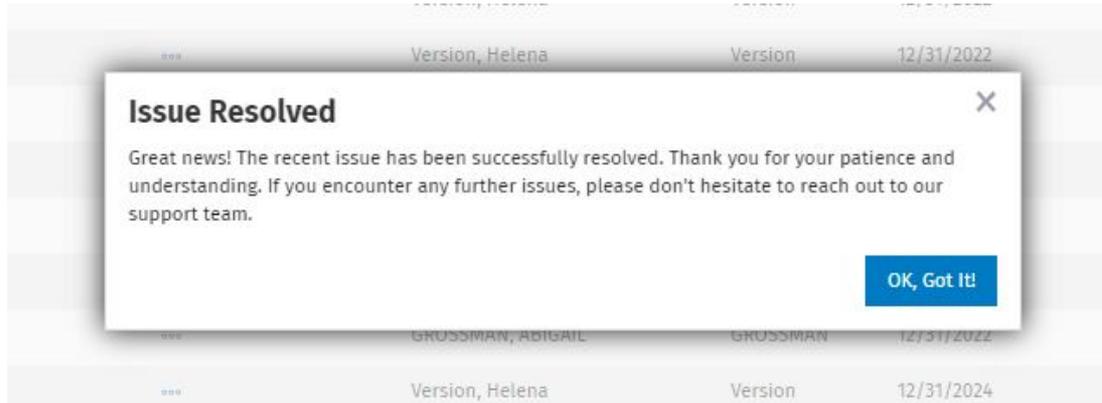
- **Tax Summary Report** is available for consolidated trial balances. (Note: Was previously available for subsidiary trial balances only.)
- **Export tax balances** to a tax return is available for consolidated trial balances. (Note: Was previously available for subsidiary trial balances only.)
- **Insert TB Links** in Microsoft® Excel® or Microsoft® Word workpapers is available for consolidated and subsidiary trial balances.

[Learn more about what's new in CCH Access™ Engagement](#)

Ok, Got It!

...	GROSS, ABIGAIL	GROSS	12/31/2023	Tax Return
...	Version, Helena	Version	12/31/2023	Audit
...	Version, Helena	Version	12/31/2023	Audit

Announcements and updates



How-to guides



Microsoft Excel

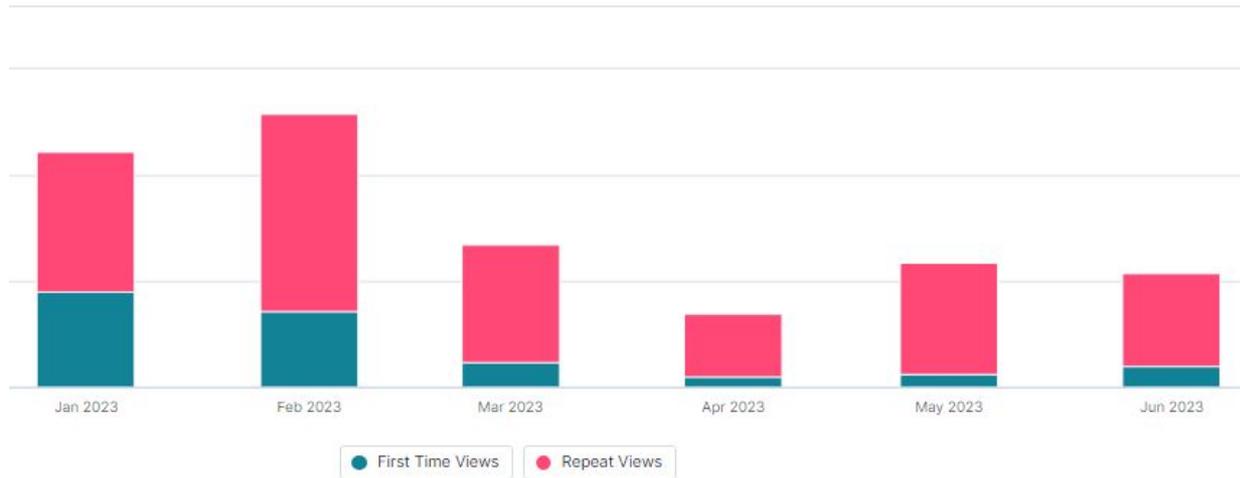
Excel Import Requirements ✕

- A Microsoft® Excel® 2013 or newer XLSX file that contains only one worksheet.
- Accounts must begin on Row 2 of the worksheet. Row 1 can be blank or used for header information.
- Subtotals or extraneous information should not be below or to the right of the data.
- Only one instance of each account number and account name listed.
- Account balances must be positive amounts in either the debit or credit column.
- You cannot have a balance (including a zero) in both the debit and credit columns.
- The debit and credit balances must be in separate columns.
- Total debits equal total credits, or the data will not upload.

[Learn more about importing trial balance data.](#)

Current Period De (require

How-to guides





PENDOMONIUM 2023

Onboarding Users Results

- Improve first time experience
- Reduce support calls
- Drive feature adoption
- Improve NPS





PENDOMONIUM 2023

Leveraging Integrations

- Calendly
- Salesforce





Engagement List

+ Start New Engagement

Enter client name or ID

My Recent Engagements

ENGAGEMENT	ID	ACTIONS	YEAR-END-DATE	ENGAGEMENT TYPE	DUE DATE
kg-tbrep-rf-eng1-r1		...	12/31/2023	Audit	
M3TestLocal		...	12/31/2022	Audit	
KPP123		...	12/31/2022	Audit	
kg-tbrep-rf-eng1		...	12/31/2022	Audit	
Enagemenet_CONSOL FIN		...	12/31/2022	Audit	
tesdsdd RF1		...	12/31/2023	Audit	
tesdsdd		...	12/31/2022	Audit	
JIYA001		...	12/31/2022	Audit	
wefwe		...	12/31/2022	Audit	
testunalancedpfxnormaldata		...	12/31/2022	Audit	
sdfsdfsdf		...	12/31/2021	Audit	
Mustafa M-3		...	12/31/2022	Audit	
TestDavid		...	12/31/2022	Audit	
test0802		...	12/31/2022	Audit	
asdasd		...	12/31/2022	Tax Return	
rrererer		...	12/31/2022	Audit	



Mustafa Kamal, CPA, CA

User Feedback

🕒 15 min

🗨️ Web conferencing details provided upon confirmation.

Select a Day

< August 2023 >

SUN	MON	TUE	WED	THU	FRI	SAT
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26



Y	SUB-GROUP	TYPE	UNADJUSTED 12/31/2021	AJE 12/31/2021	ADJUSTED 12/31/2021
					0.00
					100.00
					300.00
					(300.00)
					(300.00)
					400.00
		Revenue	(200.00)		(200.00)
		Revenue	(100.00)		(100.00)

Your Feedback Matters! ✕

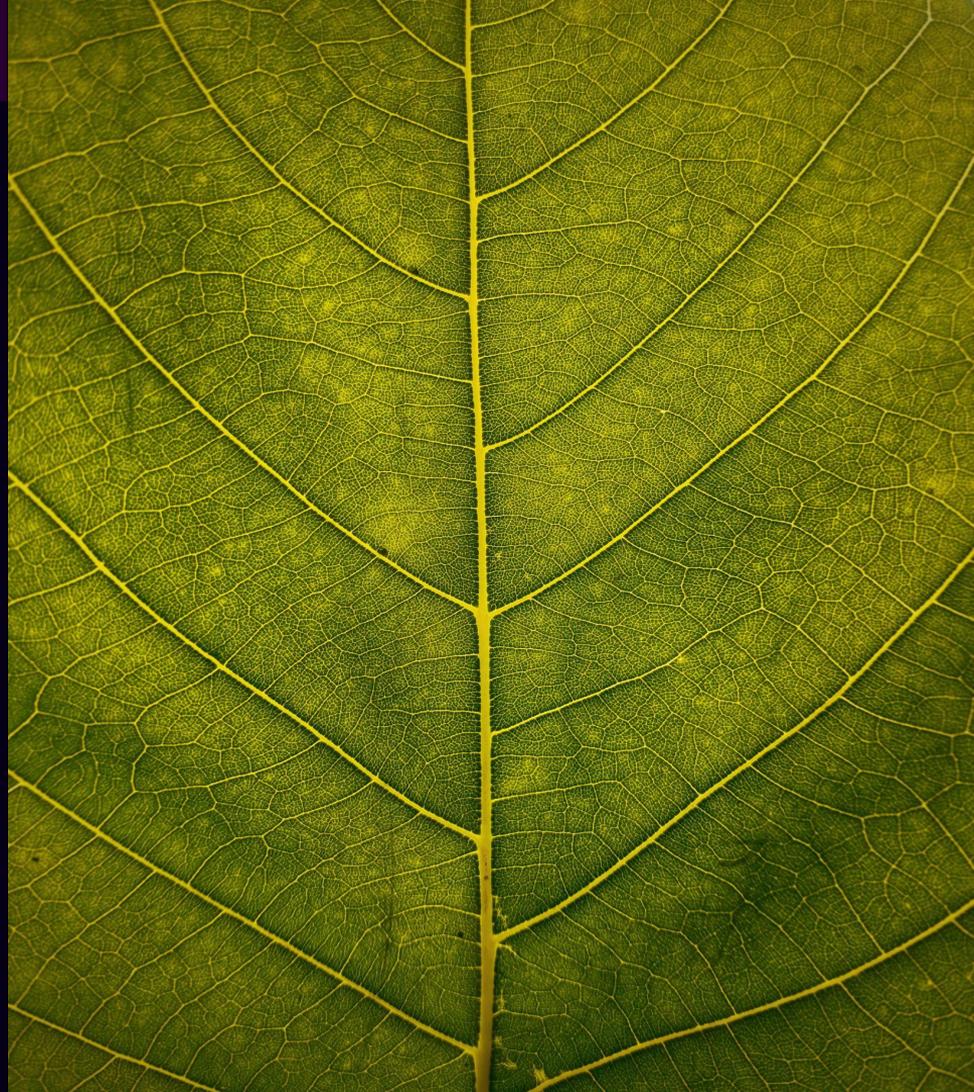
Hello there! We've noticed you're a pro at using this feature, and we're thrilled about it!

We'd be absolutely delighted to hear your thoughts and ideas to make it even better. Could we schedule a quick chat to discuss your experience and suggestions?

Close Book Feedback Session

Leveraging Integrations

- Calendly
- Salesforce



Salesforce



Account ID	Last Visit (All Apps)	First Visit (All Apps)	Days Active	Events	Time on App (minutes)	Visitors	ERP Account Name (All Apps)	SubSegment (All Apps)	Legacy/Alternate Application
798095	Aug 4, 2023 11:41:53...	Dec 10, 2021 8:08:37...	198	1948446	149346	64		Sole Proprietor	798095
758741	Aug 4, 2023 11:41:41...	Jul 12, 2022 12:13:49...	196	381105	32319	19		20-49 Total Employees	758741
163219	Aug 4, 2023 11:41:33...	Aug 15, 2022 12:55:5...	195	271391	28037	16		10-19 Total Employees	163219
138308	Aug 4, 2023 2:57:47 ...	Dec 12, 2022 1:57:59...	186	1194443	98214	27		10-19 Total Employees	138308
758098	Aug 4, 2023 11:34:25...	Dec 13, 2021 7:57:32...	180	718701	58476	50		50-99 Total Employees	758098
162155	Aug 4, 2023 11:41:28...	Dec 10, 2021 7:35:40...	173	339247	25665	10		Mid Market	162155
769759	Aug 4, 2023 11:37:33...	Oct 27, 2021 4:03:51 ...	173	392518	30328	92		50-99 Total Employees	769759

PENDOMONIUM 2023

Salesforce



<input type="checkbox"/> Segment name <small>↕</small>	Last up... <small>↓</small>	Created... <small>↕</small>	Rules
<input type="checkbox"/> Top 100 Firms	Sep 10, 20...	mustafa.ka...	⚙️ SubSegment is equal to Top 100 Firms
<input type="checkbox"/> Large Enterprise	Sep 10, 20...	mustafa.ka...	⚙️ SubSegment is equal to Large Enterprise
<input type="checkbox"/> Global Enterprise	Sep 10, 20...	mustafa.ka...	⚙️ SubSegment is equal to Global Enterprise
<input type="checkbox"/> 500+ Total employees	Sep 10, 20...	mustafa.ka...	⚙️ SubSegment is equal to 500 +
<input type="checkbox"/> 100+ Total employees	Sep 10, 20...	mustafa.ka...	⚙️ SubSegment is equal to 100+ Total Employees
<input type="checkbox"/> 50-99 Total employees	Sep 10, 20...	mustafa.ka...	⚙️ SubSegment is equal to 50-99 Total Employees
<input type="checkbox"/> 10-19 Total employees	Sep 10, 20...	mustafa.ka...	⚙️ SubSegment is equal to 10-19 Total Employees + 1 more rule
<input type="checkbox"/> 5-9 Total employees	Sep 10, 20...	mustafa.ka...	⚙️ SubSegment is equal to 5-9 Total Employees
<input type="checkbox"/> Sole Proprietor	Sep 10, 20...	mustafa.ka...	⚙️ SubSegment is equal to Sole Proprietor

Salesforce



<input type="checkbox"/>	Visitor ID	Date	Rating	Response Group	Channel	Account ID	ERP Account Name	SubSegment
<input type="checkbox"/>	[REDACTED]	Sep 10, 20...	10	Promoter	In-app	164175	[REDACTED]	Sole Proprietor
<input type="checkbox"/>	[REDACTED]	Sep 7, 2023	8	Passive	In-app	149070	[REDACTED]	5-9 Total Employees
<input type="checkbox"/>	[REDACTED]	Sep 6, 2023	4	Detractor	In-app	161922	[REDACTED]	10-19 Total Employees
<input type="checkbox"/>	[REDACTED]	Sep 5, 2023	9	Promoter	In-app	758692	[REDACTED]	10-19 Total Employees
<input type="checkbox"/>	[REDACTED]	Sep 4, 2023	8	Passive	In-app	150552	[REDACTED]	5-9 Total Employees
<input type="checkbox"/>	[REDACTED]	Aug 31, 20...	10	Promoter	In-app	758692	[REDACTED]	10-19 Total Employees
<input type="checkbox"/>	[REDACTED]	Aug 30, 20...	10	Promoter	In-app	152466	[REDACTED]	5-9 Total Employees
<input type="checkbox"/>	[REDACTED]	Aug 29, 20...	8	Passive	In-app	798095	[REDACTED]	50-99 Total Employees
<input type="checkbox"/>	[REDACTED]	Aug 29, 20...	10	Promoter	In-app	149167	[REDACTED]	10-19 Total Employees

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Salesforce



Account #	Dec 2022	Jan 2023	Feb 2023	Mar 2023	April 2023	May 2023	June 2023	First Visit	MAU=0 for 2+ months	NPS	Trend	Contract End Date	User	Retention Rep
☒ HINGE STAR/CA	0	1	2	0	0	2	1	3/10/2022	Yes	2.00		Feb-24	2	HINGE STAR/CA
☒ HINGE STAR/CA	0	0	1	1	1	1	1	1/18/2022	Yes	8.00				
☒ HINGE STAR/CA	0	0	1	1	1	1	1	2/1/2023	Yes	10.00				
☒ HINGE STAR/CA	3	1	2	2	1	0	0	12/15/2021	Yes	9.00				
☒ HINGE STAR/CA	3	10	7	2	0	0	0	8/24/2022	Yes	3.50				HINGE STAR/CA
☒ HINGE STAR/CA	1	0	0	0	2	2	3	12/5/2022	Yes	10.00				
☒ HINGE STAR/CA	0	0	1	1	1	0	2	6/27/2022	Yes	3.00				HINGE STAR/CA
☒ HINGE STAR/CA	0	2	1	1	0	0	0	1/13/2023	Yes	10.00				
☒ HINGE STAR/CA	0	0	1	1	1	1	1	2/25/2023	Yes	10.00				
☒ HINGE STAR/CA	0	0	0	0	0	0	2	6/5/2023	Yes	7.00				
☒ HINGE STAR/CA	1	7	5	0	0	0	0	7/26/2022	Yes	0.00		Jul-23	15	HINGE STAR/CA
☒ HINGE STAR/CA	0	5	6	3	1	0	0	1/5/2022	Yes	5.00				HINGE STAR/CA
☒ HINGE STAR/CA	6	7	3	3	0	0	0	11/2/2022	Yes	3.00		Mar-24	10	HINGE STAR/CA

PENDOMONIUM 2023



STATUS	CLIENT	CLIENT ID	YEAR-END-DATE	ENGAGEMENT TYPE
	Version, Helena	Version	12/31/2022	Audit
	Version, Helena	Version	12/31/2022	Audit
	V			Audit
	H			Audit
	G			Audit
	G			Audit
	V			Audit
	Version, Helena	Version	12/31/2022	Audit
	Version, Helena	Version	12/31/2024	Audit
	Version, Helena	Version	12/31/2023	Audit

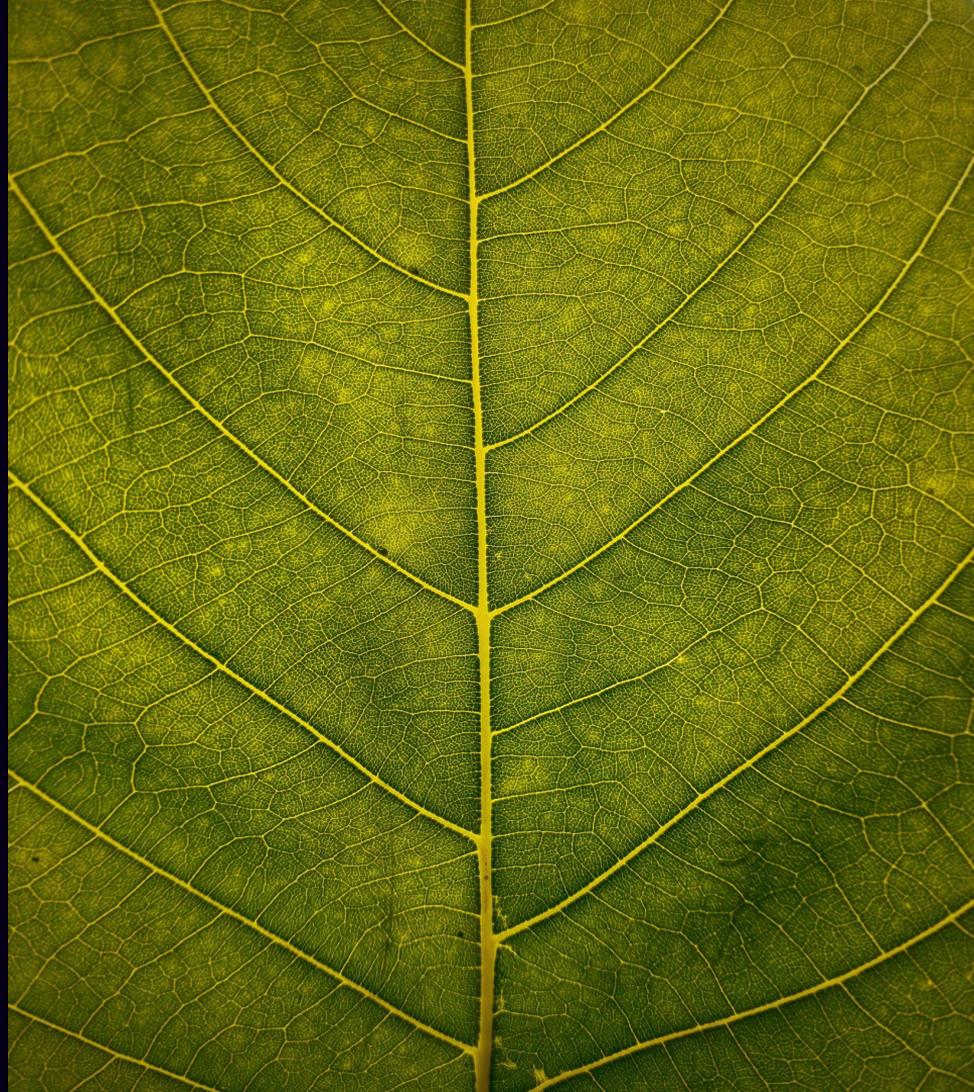
Software Renewal ✕

Stay prepared for tax season. Ensure you renew today. Login to [My Account](#) or contact CCHAccessFinancialPrep@wolterskluwer.com to check your renewal status.

[Dismiss](#) [Remind Me Later](#)

Leveraging Integration Results

- Streamlined feedback sessions
- Enhanced customer insights and increased retention
- Reduced support calls



Call to Action



- Create Product Areas and Segments
- Activate NPS
- Enable Learning Center
- Set-up how-to guides
- Leverage integrations
- Share with your business partners



Thank you!

PENDOMONIUM 2023



PENDO MONIUM 2023