

Busy Season Ready:

Grant Thornton & Validis



Welcome



Liam Te-Wierik
Partner and Head of
Digital Assurance



Jonathan Bell
Implementation Manager



Agenda

- Turning your clients into **superfans** –getting client buy in and mastering client adoption
- Add **VALUE** with everything you do
- Real life experiences of how **Grant Thornton** and other clients have leveraged our team to drive quicker and better decisions

Success would be

If you leave with 3 reasons why you can't wait to adopt Validis this busy season

Now Is the Time

Why you can't wait to adopt a solution like Validis



Jim Bourke
MD, Head of
Audit
transformation

withum 

"Absolutely amazing concept and technology... Validis will totally change the way you do auditing forever"



Liam Te-Wierik

Partner and
Head of Digital Assurance



The Seamless Single Client Journey

The screenshot shows the Validis web application interface. At the top, there's a header with the Validis logo, a 'Company Name' dropdown, 'Company details', a 'Connect' button, and user settings. Below the header, a navigation bar includes 'Exit to Homepage' and the main heading 'Select Your Accounting Package'. A progress indicator shows step 1. The main content area is titled 'Select Accounting Package' and contains a search bar with the text 'Search for or choose your accounting package to proceed with the data connection.' Below the search bar, a list of accounting packages is displayed: Oracle Netsuite, Oracle Peoplesoft, QuickBooks online, Sage50, and Xero. A 'Next' button is at the bottom left. To the right of the list, a placeholder area says 'Nothing here yet' and 'Please select an accounting package to see the steps for connecting your account.'



Connect or Upload to share data

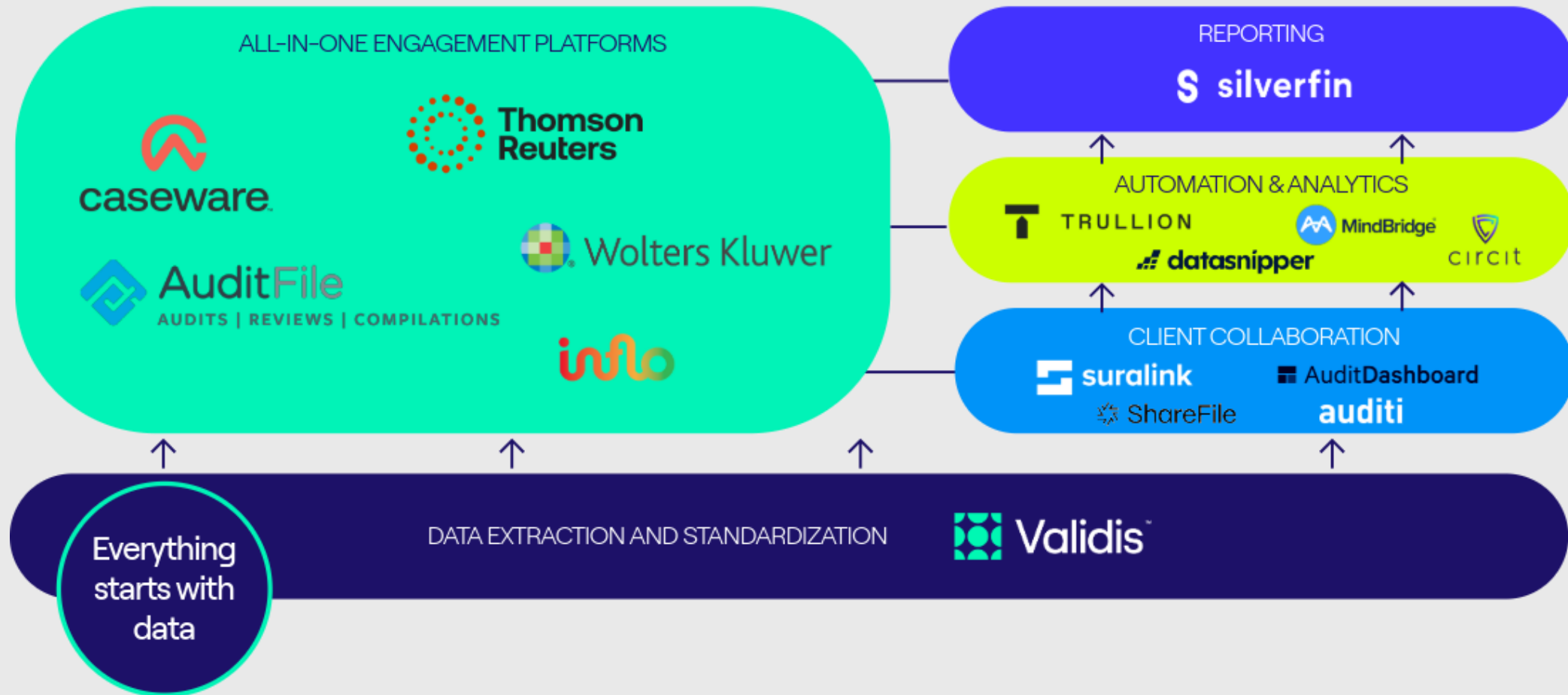


1,000+ accounting packages supported



One Journey, One Process, One Output

The modern audit tech stack



Manual Workflows Are Broken



Hours lost to manual exports and reviews



Frequent data inconsistencies



Long onboarding and audit cycles



Impacts: Timelines, quality, team morale & loss of talent

Transforming audit workflows – Caseware & Validis

Validis + Caseware
[LinkedIn video on Vimeo](#)

The screenshots illustrate the workflow for importing data from Validis into Caseware:

- Add data:** The user can upload a data file or import from an existing engagement (e.g., Caseware Cloud Engagement).
- Authenticate: Log in to Validis:** The user completes required fields and clicks 'Connect to log in to Validis'.
- Select an organization from Validis:** The user selects an organization from a list (e.g., Demo Clothing Retailers, Validis UK Ltd, Clothing Retailer, Gabs Test, Gabriella Test, Test1PW, Single Test).
- Confirmation of data to import:** The user confirms the data to import for the selected organization (e.g., Demo Clothing Retailers) from Validis, specifying the source and date range (e.g., 1/1/24 - 12/31/24). The user can also select the data to import (e.g., Trial balance, General ledger).

Validis

3 Reasons to Adopt

What are our clients
saying about
Validis?

We want you to:
See Real Results:

Our clients are seeing

- Huge time savings on manual tasks
- Increased focus on audit quality
- Higher client satisfaction

"The time saved from processing and formatting the data can now be spent on other aspects of the Audit, saving time and headaches overall."

— Zhong Ang, Senior Data Analyst, Grant Thornton



We want you to:

Love the Work You Do

Our research with clients has seen:

- 60% of juniors leave in 2 years
- Manual work = burnout & turnover
- Validis creates modern, engaging audit roles

"We have 100% of the clients' data so we can move away from sampling, which was always an industry bugbear"

— Liam Te-Wierik, Grant Thornton



We want you to:

Gain a Competitive Edge

Our clients have said they have:

- Faster client onboarding
- Transparent, trustworthy reporting
- Positioned their firm as a tech leader
- Waiting = Falling Behind

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— Jim Bourke, Withum



Questions?

Paul.warle@validis.com

Jonathan.bell@validis.com