

## Baker Tilly Trusts Soterre with Unbiased Audits for Qlik Sense

For years, Baker Tilly has been the trusted financial advisory through its offices world-wide. The Dutch BI team trusted Qlik Sense for their reporting needs.

Their environment grew to over 1,500 apps. The apps needed to be deployed twice between environments while maintaining auditability. With no room for mistakes, the team adopted Soterre to improve time working in Qlik Sense.

In the financial industry, there is no room for error. Soterre's change management, documentation, easy deployment, traceability, and audit capabilities provided the Qlik developers at Baker Tilly with the same level of trust that their customers also expected of them.



### Key results

- Deploying an app to production cut by 8x
- Only one test and validation cycle needed per deployment
- Improved auditing process provided one accepted version of the truth

## Financial Firm Built on Trust

Baker Tilly is a leading advisory, tax, and assurance firm dedicated to building long-lasting relationships with its clients. Its mission is to protect its client's value in an ever-changing world. The company emphasizes building trust with each of its clients. But how do they trust their data is accurate and secure?

The adoption of Qlik Sense for Analytics started with Jan-Willem van Essen, Manager IT Advisory at Baker Tilly. Before that, Excel spreadsheets were the go-to way for data analysis and reporting. Within five years of adopting Qlik, Jan-Willem's team has grown to encompass five different Qlik developers and 12 different testers and super users spread across 12 offices throughout The Netherlands.

The financial teams analyze data using Qlik Sense in three environments: development, production, and an external, customer-facing environment where customers can see their data if interested. The team is planning on adding a fourth environment for internal management and dashboarding.

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## Large Qlik Sense Environment

The Baker Tilly team maintains over 1,500 apps in their Qlik Sense environments that are used to serve its customers. The team hit a cycle of making changes and validating them in both development and production, all while maintaining audit and acceptance trails in each. This led to extremely long cycles where apps became unavailable. The need to make changes manually twice quickly added risks and the temptation to make those edits directly in production, which would have resulted in unvalidated content that was not audit-compliant.

As a financial organization, audits are a big component of Baker Tilly's success. "If you go to a customer, their first question is, how is your change management?" explained Jan-Willem. With no natural version control in Qlik, there was no way to ensure changes were tested. It was difficult to prove testing and acceptance happened. The standard Qlik solution of building an API and using track & trace was labor intensive and manual.

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## Discovering Soterre for Qlik Sense

At Qlik Qconnections in 2019, Jan-Willem met with the Motio team and first learned of the product Soterre. As his team was spending too much time migrating between the test and development environment, a discussion on Soterre's deployment capability stood out.



"For us it was a no-brainer to implement such a tool. If we go to a customer, their first question is how is your change management? We need to have that ourselves."



## Fraction of the Time from Typical Deployments

The deployment capability in Soterre provided value immediately. To create an app for a new client in a development environment and deploy it to production, “has gone from a day to an hour. We need that because with five developers, you need to be efficient. Otherwise we are spending all of our time testing or in acceptance. That is not what you want” explained Jan-Willem.

Now there was no need to test and validate twice to deploy content. Baker Tilly’s customers saw for themselves how quickly you could turn data around and make it available.

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## Auditing’s Benefit from Change Management

When it became time for an audit, the Qlik developers had to be ready with all of the answers to questions they could not always anticipate. The financial audit is not necessarily in scope, but the BI test is. With Soterre, Jan-Willem’s team became more confident that their reporting was accurate. Soterre creates a log file where they can pinpoint what was migrated & accepted between environments, and they can include notes. This transformed the internal audit process. Soterre provides one version of the truth, universally accepted by everybody - customers and employees.

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[www.motio.com](http://www.motio.com)



(972) 447-9595



7161 Bishop Rd. Ste 200 Plano, TX 75024