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Wolters Kluwer TeamMate Audit Solutions

# University of Toledo — Small teams doing big things



The **University of Toledo** is a public research university and academic medical center with a clear mission to educate students to become future-ready graduates. With values that focus on academic excellence, research and innovation, community, and integrity, the university has been educating and improving the lives of their student population since 1872.



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Among the staff dedicated to this higher education is David Cutri, Chief Audit Executive / Chief Compliance Officer for the university's academic research operations, including the medical center, physicians' practice plan, and charitable foundations. Early conversations between David and TeamMate identified a need for greater efficiency as a top priority for the team, as well as a focus on enhanced standards reporting and increased visibility across

projects. Working at the college university level, it was also important to stay on top of the various Title IX compliance requirements that play such a vital role in the lives of young athletes.

TeamMate recently spoke with David to learn how the implementation and in-depth training of TeamMate+ has afforded his small team of three greater success.

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**David Cutri**  
Chief Audit Executive  
Chief Compliance Officer  
University of Toledo



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**David Cutri**  
Chief Audit Executive  
Chief Compliance Officer  
University of Toledo

**TeamMate:** How would you describe the overall experience for you and your team after TeamMate+ was initially implemented?

**David Cutri:** Our relationship with TeamMate has been great. We received a great deal of training from TeamMate support services. Everything from training for our Champions and managers, to getting up to speed quickly with data analytics and more. I come from corporate America and have used audit management tools in the past. Although the rest of my staff has not had experience with proper auditing tools, I immediately knew what the potential of TeamMate+ could be and how it could positively affect the work that we do.

**TeamMate:** How would you characterize the training expectations and resulting experience from the rest of your staff?

**David Cutri:** The team was very receptive to the tool and the support that TeamMate provided. The team was coming from what I call the “Bill Gates method” of a world filled with spreadsheets and Word documents. Given we never had audit management software at the University of Toledo, I was excited for the team to see the potential that TeamMate+ has to offer. Working with TeamMate+ has provided an increase in operational efficiencies and we are now much better positioned to conform to the updated IIA professional standards. We invested in the right tool at the right time.



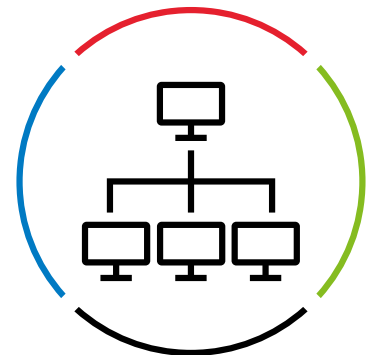
**TeamMate:** How satisfied are you with the level of support that was provided during these training sessions? Understanding that there were various roles and levels of experience on your team, do you feel you received the proper amount of training?

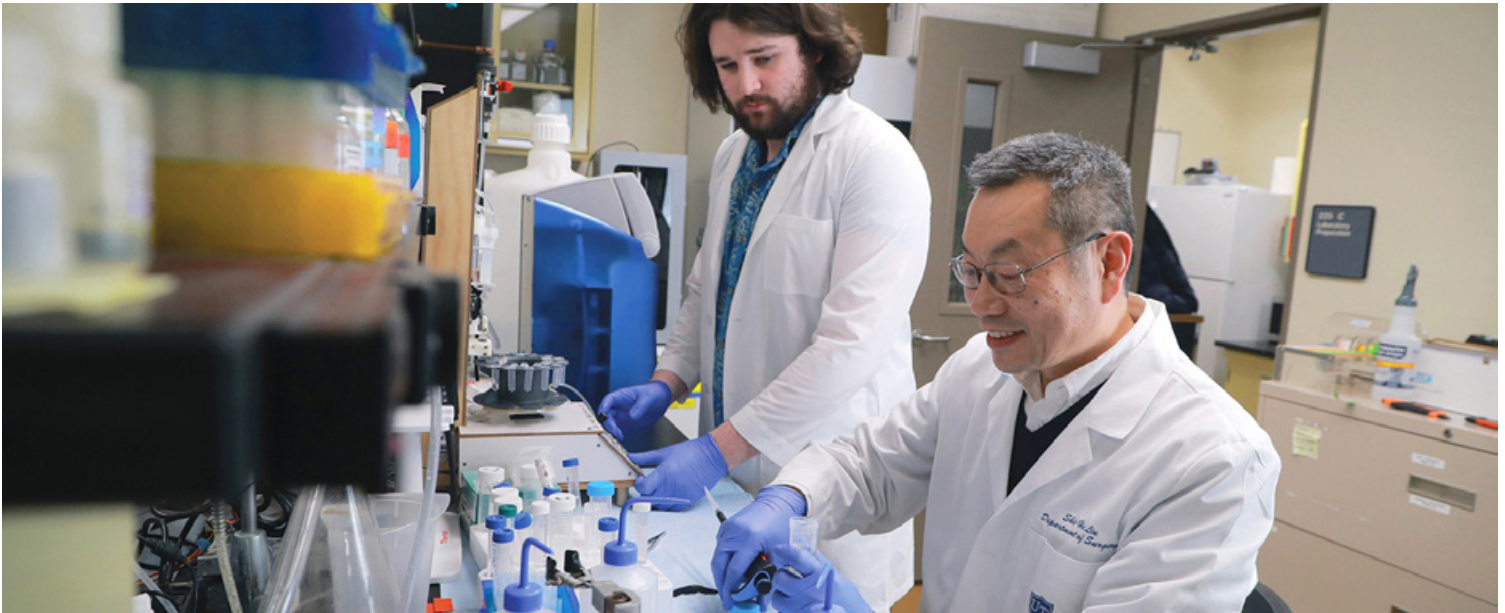
**David Cutri:** I am currently wearing different hats. I function as both the Chief Audit Executive and the Chief Compliance Officer. We participated in more than one training session to ensure all roles were professionally trained. Although some of the content overlapped between these sessions, that was both expected and welcomed. It reinforced the key training points that were being presented and allowed for greater comprehension.

I consider myself a working director, and much of my background is in IT. I am also a CPA. The rest of the team have different skillsets and experiences. As a result, I tend to be assigned more of the technology-based projects. For me, being able to attend multiple TeamMate+ training sessions proved to be a positive experience.

**TeamMate:** If new team members joined your staff in the coming months, do you feel it would be an easy process for them to quickly get up to speed with TeamMate+ and hit the ground running?

**David Cutri:** I think so, and we are eager to complete our projects from start to finish using TeamMate+. We have been provided with a variety of training materials and good documentation from TeamMate+ that should make the learning curve easy for newer employees. For example, our newest auditor is particularly good at documenting processes, even though he does not have traditional core audit experience. However, he is good at breaking things down and making them clearer for everybody. It is my hope that he will be able to use TeamMate+ on the compliance, governance, and assurance side of things as well.





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**TeamMate:** Does anything stand out regarding the training you received and how you were assisted throughout the process?

**David Cutri:** Everyone was exceptionally patient with us to ensure our objectives were met. And, when it comes to this level of technology, patience was very much appreciated. If something was not completely clear, or if we were working through aspects of our methodology, the added guidance and reinforcement of prior points certainly made the functionality of TeamMate+ crystalize. We know there is available functionality that we may not necessarily use out of the gate, but the training helped us realize why the capabilities are there. This prompted us to reprogram ourselves to better understand why something is important and consider whether we can leverage that in the future. Our training partner was very patient, very professional, and did a wonderful job.

**TeamMate:** If you were speaking to someone that is in a similar position as yourself (taking steps to automate your audit work as a smaller team), is there anything that you would say to them?

**David Cutri:** Anyone that is on the fence about investing in TeamMate+ should understand that it will absolutely help you become more compliant with the professional standards levels of documentation. You will not need to worry about spending too much time, or worse, missing anything in terms of providing evidence and documentation. You can present things in a way that is meaningful. TeamMate+ will help you, especially at a time where more is expected from you and from the professional community.

**TeamMate:** Your sentiment about efficiency is relevant to both the importance of compliance and the professional standards.

**David Cutri:** Absolutely! As I stated earlier, I come from the corporate world. I was in corporate audit when Sarbanes Oxley was a (newer) initiative. I worked for three Fortune 500 companies before coming to the University of Toledo. I come from a structured environment and maybe a higher level of automation than what we have here. While I love it here, I also love the challenges and problems that need solving. I also have a professional obligation to document my work well and consistently and in a way that my less experienced team can pick up and run with if something were to happen to me. TeamMate+ will assist with just that and I would not be doing my job if I did not prepare my team appropriately.

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**TeamMate:** Did you have any final thoughts or comments about TeamMate, its implementation, or the training that you received?

**David Cutri:** I know the potential of TeamMate+ because I have worked in large audit shops in the past. I am fully aware of the potential for audit management software like this, and so it is exciting for me to get back into that audit workflow and help develop others on the team to also see the potential that TeamMate+ has to offer. Especially at a time when more is going to be expected from all of us from a professional standards standpoint. We made the right purchase decision at a very opportune time.

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