

Grooms & Harkins

DOC.IT HAS MADE FOR A MUCH EASIER CLOSE TO THE TAX SEASON

PRODUCTIVITY

With Doc.It, our workflow has changed and sped processes up so that more of the work is accomplished on the front-end versus the back-end. We get a lot of the work done upfront; this makes the review process easier because the information is organized ahead of time.

Doc.It's impact to our firm's productivity was felt after acquiring a tax firm; we added 125 tax returns, a 15 percent increase for our firm. Because of Doc.It, we managed this increase in volume without having to add staff.

Before Doc.It, we had backups of QuickBooks and Excel spreadsheets; we printed out copies of these files and put the paper into the file. We passed a paper client file around the office with client info attached to it. After the file was prepared and reviewed, we would copy, sort and organize documents and return and file all of that in a paper file room. Operating in this way put a lot of the processing time at the back-end, which heavily burdened our administrative staff.

Before Doc.It, at least once a week we would have to drop everything and look for a file. Operating in this way was very disruptive and inefficient: It cost us time we could never recoup. Since adopting Doc.It, this may have only happened once in seven years.

An additional improvement to productivity is felt in our ability to respond to client requests immediately. The increase in productivity in this area has been dramatic. For example, anyone in our practice who has access credentials can answer client requests; it's easy and very efficient. We have eliminated nearly all call-back situations because client information is at our fingertips at any time.



Location: Casper, Wyoming

PRIMARY SOFTWARE USED IN THIS FIRM

Doc.It® Suite

Lacerte Tax

Practice CS

RTG Time & Billing

19

Doc.It® licenses



Learn how Doc.It® impacts work in our firm

PROFITABILITY

A simple way for a firm to quantify savings they could immediately attribute to Doc.It is to consider what happens in their firm when a file goes missing and everyone has to stop what they are doing to locate the file. Consider how many production hours are lost by each person in the office when they drop everything to look for a file. If you have eight people looking for the file for an hour, that translates to eight hours of production lost. If you lose that production time, one time a week during the tax season, you can begin to see there is a fair amount of productivity lost.

Because of Doc.It, we are saving by cutting down on paper file storage dramatically: There is very little paper left in our paper file room. By my estimate, we have decreased our paper consumption by two-thirds. We do this by using Doc.It as the default printer; therefore, we are printing PDFs to Doc.It and not printing to paper. Because of Doc.It, we have also cut back considerably on toner supplies and any costs associated with the printer. Additionally, prior to using Doc.It, we were adding at least three or four filing cabinets a year to store the paper. We have not purchased a single filing cabinet since, and have started to eliminate the filing cabinets as we dispose of older files.

Doc.It has impacted our ability to handle the acquisition of one CPA practice and we are in the process of acquiring another. Because of the efficiency gains with Doc.It, we have not had to add any staff nor do we anticipate having to add staff to adjust to the added workload due to these acquisitions.

MITIGATION OF RISK

We wanted to get away from being a firm that operated in silos: we strive for consistency throughout the firm. When we started with Doc.It, we came up with a system to create and store digital files – this helped us with the standardization of processes. This standardization has helped with new staff because they have to only learn one way to do a process.

AWARD OF EXCELLENCE

We love Doc.It and I cannot imagine operating without it. It is remarkable how easy Doc.It is to use. With Doc.It our firm has become very organized – the Doc.It Binder system is great. I have had people ask me why we do not use our own file tree structure in Windows instead of using Doc.It Binders. My reply to them is why re-invent the wheel when Doc.It Binders are so user-friendly.

I have to also mention the Doc.It support staff. They are very responsive and helpful.

