

LublinSussman Group, LLP

WITH DOC.IT, YOU WILL NEVER HAVE A PROBLEM. THEIR TEAM PROVIDES FAST TURN-AROUND AND GREAT CUSTOMER SERVICE.

WHAT DROVE YOU TO INVESTIGATE DOC.IT?

It was becoming a time to get away from paper. We read books and literature that guided us to what other firms were doing.

WERE YOU CONSIDERING ANY OTHER DM & WORKFLOW SOFTWARE?

Yes. We were considering CCH and Thomson. We had Lacerte DMS at the time, only using it to save tax returns. We needed something more. We were really impressed with what Doc.It had to offer.

As of a few months ago, we emptied our paper file room; we will use that space for offices or whatever we decide to do in the future.

WHAT IMPROVED IN YOUR FIRM AFTER IMPLEMENTING DOC.IT?

We used to have an employee who spent all day in the file room. Because of Doc.It, we do not have that need anymore. That employee is free to do other work now.

There is a noticeable improvement in the speed with which we retrieve client tax returns. I no longer have to put the phone down or call a client back after I run to the file room. Clients often call with questions or asking for a copy of their tax return. Because of Doc.It, I can answer a client question immediately, which is a huge improvement.

We have experienced a cost-savings because we don't buy as much paper. Additionally, our printing expense has been reduced.



Location: Toledo, Ohio

PRIMARY SOFTWARE USED IN THIS FIRM

Doc.It® Suite
CCH ProSystem Tax
CaseWare
QuickBooks

21

Doc.It® licenses



Advice to partners or IT professionals considering Doc.It®

WHAT WAS YOUR BIGGEST CONCERN REGARDING DOC.IT?

I don't recall our concerns; what I do recall is that we really liked how Doc.It was laid out. We also liked the cost and the customer service was great. Additionally, Doc.It's customer care team speaks English as a first language: They are easily understandable.

WHAT WOULD YOU SAY TO A PARTNER OR IT PROFESSIONAL WHO HAS THAT SAME CONCERN?

With Doc.It you will never have a problem. Their team provides fast turn-around and great customer service. I recall a time when their customer care called me in the evening at home to help me resolve an issue. This was very cool.

WAS DOC.IT A DIFFICULT CHANGE FOR THE FIRM?

Doc.It was not a difficult change. We expected a change because we were going from operating with a paper file cabinet to paperless. There is always going to be a learning curve, but Doc.It wasn't hard. Today, to train new hires, we have the new hire work alongside a senior person to learn Doc.It. This works well for us.

WHAT WOULD YOU SAY TO A PARTNER OR IT PROFESSIONAL CONCERNED ABOUT THE CHANGE?

There is really nothing to worry about. It is not that big of a change. It is not overwhelming.

DID DOC.IT HELP YOU WITH PROCESS IMPROVEMENT?

Yes. With Doc.It, we scan into Doc.It Inbox and the document is placed into a Doc.It folder. Our process was improved because we front-scan and work digitally with Doc.It from that point forward.

WHAT WOULD YOU SAY TO A PARTNER OR IT PROFESSIONAL CONCERNED ABOUT PROCESS IMPROVEMENT?

There is always room for improvement – Doc.It would certainly advise you on whether or not your process can be improved. Doc.It can be trusted to do this.

HOW DID THE IMPLEMENTATION PROCESS AND TRAINING GO?

Implementation and training went well: It was easy. We went through a few days of Doc.It's webinar training. The whole process worked well for us.

WHAT WOULD YOU SAY TO A PARTNER OR IT PROFESSIONAL CONCERNED ABOUT IMPLEMENTATION AND TRAINING?

Doc.It training is very good, as is their customer service. If you need additional training after-the-fact, you can call Doc.It and they will walk you through whatever you need. Doc.It has online training modules that are great. You simply go online and download them. It is that easy.

