

Lorenz & Currie CA

“IF YOU ARE LOOKING FOR GREATER EFFICIENCY I RECOMMEND DOC.IT SUITE.”

– Richer, Partner

OUR IT SOLUTION

We have a 3rd party IT service provider. They were amazing with their help implementing Doc.It; they sat in on all of our rollout meetings and did not charge us for their time.

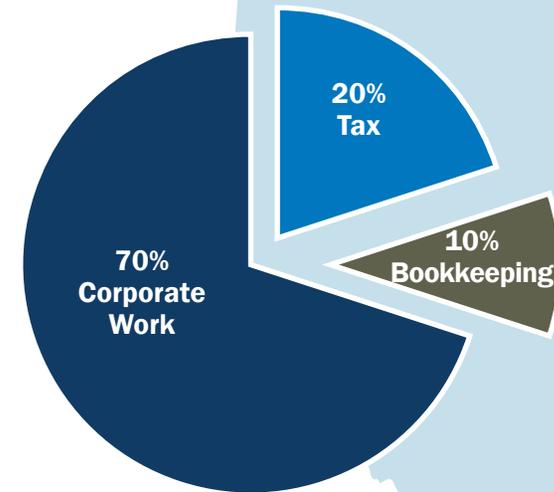
THE PROCESS WE FOLLOW THAT RESULTED IN THE DECISION TO BUY DOC.IT SUITE

Efficiency gains trigger our decision to take action. We are motivated to take action by what we learn at the annual Entrepreneurial CPAs of Edmonton event. We begin our investigation which typically involves a call with the accounting technology sales person. Our 3rd party IT service provider makes recommendations too, however, we consider their recommendations keeping in mind they provide services to all types of clients, not just accounting firms.

Our timeline to purchase varies; eight months is common. Because our annual Edmonton event occurs in November our timeline to adopt can take up to eight months; we take time to think about a product. This timeline also factors in the likelihood of having to put the adoption of a technology on hold due to busy season. It is common to go forward with a new accounting technology by the end of May or during June.

We found Doc.It Suite because Dwayne Bragonier spoke at our conference and recommended it. This initiated our investigation. We also needed a server upgrade to be eFile compliant, we handled this implementation at the same time.

Attending events can help in our purchasing decision-making as well. We like hearing our peers comment in a session, but really enjoy the informal after-hours social mixers where attendees seems open and willing to share. We like talking to like-sized firms about what they are using in their firm and how it is working for them.



Location:
Alberta, Canada

PRIMARY SOFTWARE USED IN THIS FIRM

Doc.It® Suite
TaxPrep
Sage
QuickBooks

12

Doc.It® licenses

LORENZ & CURRIE CA CONTINUED

WHAT I LIKE ABOUT DOC.IT SUITE

We really like the Doc.It Archive explorer. We have every file and document at our fingertips.

WHAT HAS IMPROVED IN OUR FIRM SINCE THE ADOPTION OF DOC.IT SUITE

We have had Doc.It Suite for two years. We are starting to see a significant decrease in our paper files. We are comfortable enough with the technology to archive old files resulting in a paper shrink and added efficiencies. For example, file retrieval has changed. Today, when a client calls I can access their information immediately on my computer versus how I used to have to handle this scenario; calling them back because I had to go find the information.

ADVICE FOR MY PEERS WHO ARE CONSIDERING DOC.IT SUITE

If you are looking for greater efficiency I recommend Doc.It Suite. In the long-run, the use of Doc.It will result in greater efficiency and huge space-savings for your firm. Saving space will lower expenses because it costs far more to rent physical space than it does to use server space.