

Lapp, Fatch, Myers and Gallagher

“DOC.IT IS AFFORDABLE; IT HAS IMPROVED CLIENT SERVICE TIME, IT IS EASIER TO FIND DOCUMENTS AND THEIR TECHNICAL SUPPORT STAFF IS EXCELLENT.”

– Pat Malvarose, Firm Administrator

OUR IT SOLUTION

I handle IT and we use a networking management firm and pay for network resources. The network management firm updates servers and makes recommendations. I was responsible for the onboarding of Doc.It Suite.

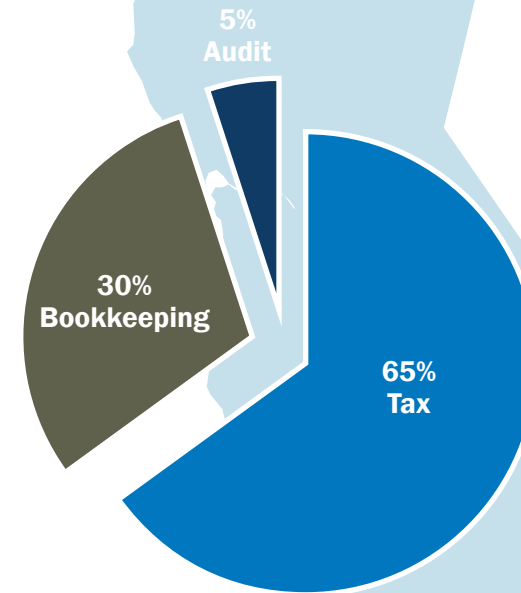
THE ISSUES THAT FUELED MY DECISION TO INVESTIGATE DOC.IT SUITE

Intuit DMS was no longer going to be available; they recommended a cloud-based application as an alternative. We are in an agricultural community and would need better and more consistent bandwidth for this to be considered. Infrastructure is something I am focused on; our firm's infrastructure was not ready for what Intuit was recommending.

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

I found Doc.It Suite by doing a Google search. This led to an article on TheProgressiveAccountant and I listened to Randy Johnston's recommendation.

Attending events can help the process of making a decision to buy accounting technology. I especially like events where members of the audience speak-up about products. It is pretty convincing to hear from your peers about their experience with a product. It is usually the owners who speak up in this setting; it is an interesting perspective to listen to. After attending these events I feel like I better understand what the next five years might hold in terms of where technology is headed.



Location:
California

PRIMARY SOFTWARE USED IN THIS FIRM

Doc.It® Suite
CCH ProSystem fx
QuickBooks Enterprise
CCH Trial Balance

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Doc.It® licenses

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The process I usually follow:

- I search Google. This will lead to articles (e.g. TheProgressiveAccountant) and blog posts (Randy Johnston's K2 Enterprise Blog). This also often leads to newsletters.
- I use the CPAFMA Forum, where I post questions and listen to my peers' feedback.
- My investigation focuses on these areas:
 - Network and hardware requirements.
 - User-friendliness. If a product is intuitive the learning-curve will be better.
 - Whether the product integrates with other software.
- I meet with the technology partner and present options.
- We might engage in a web demo or meet with a sales representative if one is in the local area. During these demos and meetings the technology partner has their questions answered.
- The technology partner presents the findings at a weekly technology meeting.
- The partners get back to me when they are ready to make a decision.

Making an accounting technology purchase decision after tax season and can take 6-months. I spend four- to six-weeks investigating the providers of an accounting technology. After my investigation is complete I have to work around other people's vacation schedules to move the process forward.

WHAT I LIKE ABOUT DOC.IT SUITE

- Affordable
- User-friendly
- Small resource requirements
- Historical versioning
- Excellent technical support staff
- Don's webinars

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

- Client service time
- Easier to find documents
- Staff confidence that data is backed-up
- Standardization of folder hierarchy

ADVICE FOR MY PEERS WHO ARE CONSIDERING DOC.IT SUITE

You need to evaluate your present document retention policies, the adoption of Doc.It initiates and aids that process.

When your firm adopts Doc.It Suite, I have several recommendations for my peers:

- Understand how processes and handling documents and files will change.
- Be prepared to set up and respect retention policies.
- Be prepared to increase storage on your server or upgrade your server.
- Take the time to develop your binder templates for each type of project. Do it and get it over with. Do not put this off and think you will do it at a later date; that would be awful.