Rozovics Group, LLP

"WE STARTED WITH DOC.IT FOR STANDARDIZATION AND ARCHIVING TO HELP US ENSURE A SMOOTH TRANSITION OF CLIENTS WHEN PARTNERS RETIRED. A BONUS FOR OUR FIRM HAPPENED WHEN WE IMPLEMENTED DOC.IT WORKFLOW LAST YEAR; WE USED WORKFLOW THROUGH THE TAX SEASON."

– Jeff Rozovics, Managing Partner

OUR IT SOLUTION

We have an in-house IT manager, who also runs an IT business out of our location. The installation of Doc.It was a team effort. We spent time with a Doc.It team member to prepare our legacy files for migration into Doc.It. Our IT manger was involved in the one-day migration of our legacy files from FileCabinet into Doc.It.

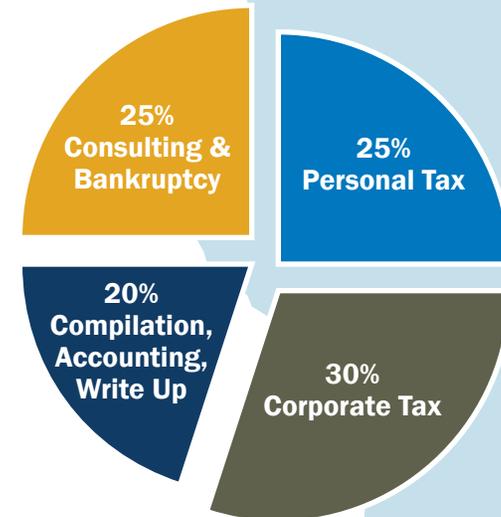Comments from our in-house IT manager:

The initial installation and coordination was not time-consuming, perhaps 4- to 5-hours for the install and two hours of coordination. The migration from FileCabinet to Doc.It was a piece of cake for me, Doc.It did all the work; I just got them into our server.

I had to read and understand the IT requirements, which took another 2- to 3-hours. Post installation is where you might run into training glitches or software glitches. When this happens, you relay the issue to Doc.It support and it gets fixed. Having a Doc.It project champion team member helped us work through the glitches as we got up to speed.

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

My father founded our firm 40 years ago; we anticipated he and other partners would be retiring. This impacted our decision to investigate ways to improve our firm to make the transition of clients easier.

We were using FileCabinet; its storage started getting larger every year, there were a lot of documents in it. The issue we were having centered on FileCabinet allowing different methodologies and file structures to be used by different partners. We knew it would be difficult for the next partner to take over a client when a partner retired.

25% Consulting & Bankruptcy

25% Personal Tax

20% Compilation, Accounting, Write Up

30% Corporate Tax

Location: Illinois

PRIMARY SOFTWARE USED IN THIS FIRM

Doc.It® Suite

UltraTax

19

Doc.It® licenses

We knew we did not want to continue with FileCabinet; Doc.It came highly recommended. We did not investigate any other providers because of the recommendations for Doc.It. I was one of the three people investigating Doc.It. Our IT manager was involved in the investigation, installation and the training of Doc.It.

My first experience with Doc.It Suite was a demo of their software at the Illinois Society of CPAs show.

The process I usually follow:

- My peers recommend a software; this typically occurs while we are at an annual event.
- I demo the software.
- I have talked to Randy Johnston several times, he is a speaker at our annual CPAConnect conference. Also, I might read marketing material featuring Randy Johnston, I am interested in what he has to say.

WHAT I LIKE ABOUT DOC.IT SUITE

With FileCabinet we had 15-year old files that should have been purged that were still being stored; we wanted a better filing system and records retention system.

We knew Doc.It would provide firm-wide standardization resulting in documents being found quicker; the transition of clients from one partner or accountant to the next would be smooth. Doc.It ensures standardized naming conventions and retention policies are applied when documents enter the system, this allows us to purge documents at the end of their retention period.

We started with Doc.It for standardization, archiving and to help us ensure a smooth transition of clients when partners retired. A bonus for our firm happened when we implemented Doc.It Workflow last year, we used Workflow through the tax season. We defined workflow steps in the tax process which resulted in us knowing exactly where every return was in the process; we are a lot more efficient because of this. Doc.It went from being our document management software to our document management and workflow software; we are sold on it.

The implementation of Doc.It took time, it was well thought-out. Setting it up to work in the standardized way we want our firm to work was worth the time invested.

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

- We have had major efficiency improvements throughout our firm.
- We have far better organization of our documents. For example, during the year we talk to clients who are closing on a house or commercial building. They send us documents that may not be needed until the following year. With Doc.It the documents are handled in a standardized way; anyone working on a client file would be able to find documents whenever they are needed. Without Doc.It it would have been hard to find those documents when we need them.
- Files are never lost or difficult to find.
- Our accountants or partners get immediately into a client file and know exactly where to find information, even if they are not familiar with the client.
- Because of Doc.It Workflow, during tax season we know exactly where every tax return is at in our 10-stage process. This is a big improvement from where we were at before implementing Doc.It Workflow.

ADVICE FOR MY PEERS WHO ARE CONSIDERING DOC.IT SUITE

I highly recommend Doc.It. We were always paperless but used FileCabinet which lacked the structure and standardization we wanted - and gained - with Doc.It.

Think about your firm's tax return process. Our tax return process used to require manual checklists and routing sheets. Today this is handled through Doc.It Workflow in a 10-step process we defined. We know the status of every tax return at any time.

When considering the adoption of Doc.It, look at the big picture. It is mission-critical to have it. Everyone should know how to use it because the standardization it provides will ensure great efficiency gains. As we look to the future there is peace of mind knowing the more people we add in our firm the more beneficial standardization becomes.