

Davies & Associates

DOC.IT'S SUPPORT IS AMAZING

WHAT DROVE YOU TO INVESTIGATE DOC.IT DM & WORKFLOW SOFTWARE?

We were looking for a paperless solution.

WERE YOU CONSIDERING ANY OTHER DM AND WORKFLOW SOFTWARE?

We were looking into CCH and CaseWare. We were looking for an archiving solution, creating PDFs, and a system that allowed us to operate as a paperless practice.

WHAT IMPROVED IN YOUR FIRM AFTER IMPLEMENTING DOC.IT?

Access to documentation improved. Today, with Doc.It, we do not have to go through a file room or flip through a file to find a document. Everything we need access to is organized in a digital environment. Documents cannot go missing, be deleted or get shredded; they are always there when you need them.

We appreciate the flow of work and the availability of the information.

Being able to edit and password-protect PDFs and the security features Doc.It has are a big improvements for us. The Doc.It Web Portal is also essential to the work we do.



PRIMARY SOFTWARE USED IN THIS FIRM

Doc.It® Suite
CaseWare
Profile (tax)

5

Doc.It® licenses



Advice to partners or IT professionals considering Doc.It®

WHAT WAS YOUR BIGGEST CONCERN REGARDING DOC.IT?

We were concerned about the structure and how much control we would have when accessing documents. We were also concerned about how much control we had when deleting documents.

Letting go of paper was also something we were concerned about. Even though we have been operating as paperless for many years, there is still hesitation to shred paper even though you scanned and archived it.

WAS DOC.IT A DIFFICULT CHANGE FOR THE FIRM?

It was because workflow changed. We had to put systems in place that worked for us to be able to use Doc.It to its fullest. You have to be willing to modify and adjust the system if what you set out to do in the beginning does not work out as you had envisioned it working. Doc.It's best practices may work for some, and, for others, you may need to adjust it.

DID DOC.IT HELP YOU WITH PROCESS IMPROVEMENT?

Yes, absolutely, in several ways:

- We had to think about the workflow and how to make it better, and how we could design it to work better for our individual firm.
- We gained the ability to move documents between people. This is especially great for our employee who works remote; this is a great improvement.
- Being able to securely email a financial statement is an improvement. We no longer have to take paper with us; this is a positive a change.

HOW DID THE IMPLEMENTATION PROCESS AND TRAINING GO?

It was great. Everybody had their own ideas of how things should go with the new system; we had to come to terms of how Doc.It was going to work for us. For example, we had to decide on the processes of how we wanted the folder structure and how to deal with paper files. Decisions we made also included whether we should scan all files or leave them in paper format.

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

Do not worry about losing documents; we have not lost one document in 10 years.

Doc.It's support is amazing. In the event of any corruption in the database, Doc.It has been there to fix it. Their ability to recover a document is remarkable. If the need arises, in the event a document has been corrupted for you too, I have no doubt they can recover the document.

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

You have to be open to it. Although we have not experienced this with Doc.It, when moving to an electronic environment, if the power goes out or the network is down, there is the potential to lose access to your documents. With backups and generators in place, you lower your risk.

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

With Doc.It, you can move a file from office-to-office or desk-to-desk without waiting for paper. With Doc.It, open the software and there it is.

There are many things you do not think that become easy and instant with Doc.It.

- Files are well-organized and easily located when needed.
- Your storage will improve. Our offsite storage has disappeared.

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

The decision to move forward has to be top-led. You must have buy-in at the top or no one at the bottom will be on board. If the partners have a commitment to it, that commitment will flow down. It is very difficult to push an idea up a ladder.

