

Buttle and Tavano

THE BIGGEST BENEFIT AND THE MAIN REASON WHY WE ADOPTED DOC.IT WAS FOR THE PRODUCTIVITY GAINS THROUGH DOC.IT'S WORKFLOW

PRODUCTIVITY

Before Doc.It, we were a firm that scanned a lot of documents. We used scanning as our attempt to be the modified paperless practice. One of our goals was to reduce the need for storage of files and to cut back in consumables like paper and toner. When Tax Prep came out with scanning software a number of years ago, we were looking forward to buying that module but we thought their pricing model was insane and out of touch with the small firms.

Our entire focus as a firm is to provide awesome customer service, and part of that definition for us is doing things very timely. Looking at Doc.It, I realized that there would be advantages to using Doc.It that would enable us to be more efficient and reduce the risk associated with tracking engagements through a manual system. More than a year after implementation, I can say that we had realized efficiencies in our workflow and our staff are comfortable with the new process and wondered how we managed before Doc.It.

After adopting Doc.It, it was easy to incorporate the manual processes we had been using into the digital process of working with Doc.It. Before using Doc.It, there was not one person who was wholly accountable for putting information in the Excel log; therefore, this task may not have been done – it was difficult to determine accountability. When you have over 1500 clients, a manual process is not the most comforting solution to tracking workflow, and it is easy to see how files, documents or processes can get missed or misplaced. With Doc.It, we now have accountability.

The biggest benefit and the main reason why we adopted Doc.It are for the productivity gains through Doc.It's Workflow. One of my key performance indicators is quick project turnaround. Doc.It's Workflow helps to ensure we achieve this. Ultimately, the faster we turnover finished work, the more our customers like us as they feel we are responding to them. The more the customer likes us, the more they will refer us. Today we bill faster and, as a consequence, we collect faster.



PRIMARY SOFTWARE USED IN THIS FIRM

Doc.It® Suite
CaseWare
ProFile/Intuit
TPS Time & Billing

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Doc.It® licenses



Learn how Doc.It® impacts work in our firm

PROFITABILITY

We learned that, with Doc.It, we take the time upfront to scan, which saves us time on the backend of the project. We know that the more you touch a file, the more expensive it is. The simple act of walking around the office to find a file costs money because it is time wasted on a non-billable act. With Doc.It, we are not walking around looking for a file and we have shortened the cycle from start to finish while reducing the touches on a file. As a result, we are more profitable.

After only one year using Doc.It, we experienced a huge benefit in cost-savings. I am surprised and pleased to report we had a \$10,000 decrease in office supply expenses over the last year. Even though we only used to print a small portion of tax returns, with Doc.It, we are not printing personal tax returns; therefore our savings over a one-year period in printing, toner, and office supplies like folders and fasteners has been amazing.

MITIGATION OF RISK

Every client will either contribute to your profit or cause a loss. When work is missed and the client calls to find out what's happening, you go into a crisis mode and that work now has priority over other work. It takes a long time to create a positive reputation in the community, but only a minute to lose it. This is what can happen when you lose track of your clients' work.

With Doc.It Workflow, we now are able to track when the file comes in, when each step in the process is started and completed, communications with the clients through the Notes or Issues function, and document review notes back to staff. We have reduced the self-inflicted stress surrounding tax deadlines to make sure that documents are filed on time, every time.

With Doc.It, we have formalized a standard process that further insulates us from risk. Doc.It makes it easy to see the steps in a process and we always know where the work is. Using Doc.It, I can easily go into the system and see what is on everyone's workflow and make sure they are staying on top of their work.

With Doc.It, we are experiencing the huge benefit of the Doc.It Suite roll-forward function. Before Doc.It, some aspects of a T4 or T5 could have been lost over the year when the partner would have had to remember the dividend. With 1,500 customers, the chances of missing a deadline to issue a T4/T5 is elevated. With Doc.It, when we do the year-end and there is a decision to issue a dividend, we put that working paper in the T5 folder and the document is now sitting there, ready for us to process during T4/T5 season. We no longer have to check hundreds of year-end files to ensure we haven't missed something.

OUR FAVORITE FEATURE IN DOC.IT

Workflow is our favorite feature. At the end of the day, for the firm to be profitable, it is all about productivity and turnover of the files. With Doc.It Workflow, I build filters that allow me to very quickly see what everyone in our practice is working on, while excluding things from the filter that are not relevant. Having this level of understanding of our workflow helps to ensure work is moving through the practice as it should.

Compliance makes up the majority of our client work, and is somewhat of a commodity; therefore, clients are choosing to do business with us because of our relationship, not because we can do a tax return. Anything that will help me enhance the customer relationship is going to differentiate us from our competitors. Ultimately, Doc.It helps me deliver what our customers want in a more efficient way.

