

Collins Barrow LLP

THE STANDARDIZATION BROUGHT INTO OUR FIRM AS A RESULT OF USING DOC.IT WAS BY FAR THE GREATEST BENEFIT

PRODUCTIVITY

Before subscribing to Doc.It, our firm was using a proprietary product from Xerox called SoftScan in combination with an off-the-shelf product, PaperPort. We would scan documents to the desktop and then file into the Microsoft Windows folder structure using basic standards and filing conventions, developed by one of our staff, endorsed by a partner.

We were interested in Doc.It because of its direct link to CaseWare, our firm's file preparation software of choice. With the adoption of Doc.It, we gained standards for document filing and a complete appreciation for the concept of "published" vs. "unpublished" documents. Additionally, Doc.It came packaged with a good training and implementation plan, which was well delivered.

After the adoption of Doc.It, we began phasing out our paper file room. Eventually, that 15' by 30' file room sat empty, with the exception of the file cabinets. It is crazy that, six years ago, I paid \$25k for these file cabinets which, until recently, we had difficulty giving away. We have repurposed that room as a client services department, where administrative staff are responsible for file initialization, finalization and assembly. We consider the repurposing of this space to be cost-neutral; however, these tasks being performed by the administrative staff will relieve professional staff, allowing them to take on more billable work. Additionally, having this room available to us for this task will allow us to operate in a centralized and standardized way, where the initialization, finalization and assembly work is done consistently by a core group of administrative staff.



PRIMARY SOFTWARE USED IN THIS FIRM

Doc.It® Suite
CaseWare
ProFile/Intuit
CCH fx Practice

70

Doc.It® licenses



Learn how Doc.It® impacts work in our firm

PROFITABILITY

Every time I try to make a system change, I get asked the same question. With Doc.It, it was no different: “How will doc.It make us money?” There are many factors that contribute to profitability. With Doc.It, we are more efficient than we were. Our firm has grown over the last several years; we have taken on more clients with confidence that we can handle the additional workload.

MITIGATION OF RISK

I can recall having difficulty locating a paper folder for a client whose last name started with “Mc.” At that time, we had 3500 T1s we would have had to look through because this folder was misfiled. Two months later, someone from our office was looking under the “P” section in our paper file room and found the “Mc” folder. I know there are firms using paper filing who still struggle like we did with misfiling. Having Doc.It and the processes, protocols and procedures to handle digital documents, makes it a lot easier to search and find them systematically.

Before Doc.It, to find a file was a long process. We may have had to identify the partner who was working on the file, go to the partner and then hope they had what we were looking for. Once we made the decision to adopt Doc.It, it became a lot easier to find files and documents. Our process is much easier. With Doc.It, we standardized processes by maintaining a consistent folder structure, where folders are digitally filed alphabetically, and easy to find, versus how we did it before.

OUR FAVORITE FEATURE IN DOC.IT

The standardization brought into our firm as a result of using Doc.It was by far the greatest benefit.

Initially, when we made the decision to go with Doc.It, it was fueled by Doc.It’s connection to CaseWare. While that connection remains important, we have found that Doc.It’s impact on the standardization of our filing has been the best aspect. There is intelligence we have gained through using Doc.It that has allowed us to become organized with electronic filing.

CaseWare was our first step in no longer having to handle paper files; however, CaseWare was not the end-all: All of the electronic files were still being poorly managed. Doc.It gave us a mechanism to organize and manage electronic files. At our firm, we all thought we were so smart with our processes but, in reality, Doc.It was smarter than we were.

At the end of the day, your competitors do what you do; some may do it better, some worse. Being better organized and effectively managing our digital files helps us to better serve our clients, which may give us an edge over the competition.

