

# Flowers & Flowers CPAs

“I DON'T KNOW HOW WE WOULD HAVE GOTTEN THROUGH TAX SEASON WITHOUT DOC.IT.”

## WHAT DROVE YOU TO INVESTIGATE DOC.IT?

Before implementing Doc.It Suite (Doc.It), Flowers & Flowers had an inconsistent file structure that was a pain to manage. Our boss was huge on workflow – he wanted to know who was working on what, where everything stood in the process, and not have to track things down. Workflow was one of the biggest selling points for us when it came to Doc.It because everyone can easily see what everyone else is working on. Before Doc.It we were already paperless, but our old solution was being discontinued which is what ultimately led us to research new solutions. The organizational and workflow benefits Doc.It has provided have been a game-changer.

## WHY DO YOU RECOMMEND DOC.IT?

I spent weeks investigating different products, resulting in a 1-inch thick file of notes from researching six different DMS options.

We love the workflow features and the standardization of filing Doc.It provides. I cannot tell you how nice it is having the ability to see exactly what is on your plate at any point throughout the day and not having to keep a running to-do list. Our old file structure was inefficient, making it difficult to find files quickly; now that we have a standardized process in place, it has been much easier to find files.

## WHAT IMPROVEMENTS DID YOU SEE IN YOUR FIRM AFTER IMPLEMENTING DOC.IT?

It helped improve our organization and to save time when having to track documents down. We feel as we continue to use it, it will become more and more valuable because everything will be at our fingertips. After implementation, my boss told me, 'I am so thankful you got Doc.It up and running for us, I don't know how we would have gotten through tax season without it'.



## PRIMARY SOFTWARE USED IN THIS FIRM

Doc.It® Suite

Lacerte

Microsoft products

# 15

Doc.It® licenses

# Advice to partners or IT professionals considering DocIt®

## WHAT WAS YOUR BIGGEST CONCERN REGARDING DOC.IT?

My biggest concern was getting the entire team on board and training everyone to be able to learn and use the software.

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

You need to buckle down, have a transition plan, and tell your team 'this is what we are doing'. The most important part is getting everyone on board. Transitioning into Doc.It was easy.

## WAS IT A DIFFICULT TRANSITION TO DOC.IT FOR YOUR FIRM?

No, we were incredibly pleased with the transition to Doc.It. The support system at Doc.It has been wonderful – we have had no issues at all and if we had any questions, we contacted support and they were more than happy to help us with anything. We have only been using Doc.It for a year and I am perfectly satisfied with how things have gone.

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

Doc.It's support and training made the transition to Doc.It painless. We would not have converted to a solution that lacked the support and training we believe is necessary. With any software, it takes some self-learning to get comfortable with a new system, but proper guidance and support from Doc.It helped minimize the learning curve.

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## ABOUT FLOWERS & FLOWERS CPAs

Flowers & Flowers CPAs primary focus is on consulting and services to closely held businesses and their owners, although they are a unique accounting firm that also provides a wide variety of other services including pro-bono work for several non-profit organizations. Since their inception in 1998, their philosophy has always been to treat their clients business like it's their own. Flowers & Flowers CPAs place client success above all else. “We want our clients to derive value from the services we provide,” said Tracy Cox, Senior Accountant at Flowers & Flowers. “While most accounting firms bill hourly, we prefer an agreement with our clients to do anything they need, within reason, for a flat fee per month. This allows clients to pick up the phone and have a conversation with us without having to worry about being on the clock and paying for it.”

**Doc.It**

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