

Nietzke & Faupel, P.C. CPAs

“Before Doc.It, our workflows were a highly manual process. We were on a slow path to digital, but Doc.It helped us speed up that process.”

WHAT DROVE YOU TO INVESTIGATE DOC.IT?

Our processes were inefficient, and the cost of separate applications was multiplying. We were reliant on Windows folders, workflow management, portals, file transfer, Adobe, and TicTieCalc toolbar. We were looking for a better workflow management application than Practice CS and were frustrated with the idea of adding yet another app.

HOW WAS YOUR EXPERIENCE IN TRANSITIONING FROM FILECABINET TO DOC.IT?

Thomson Reuters made it a rough process; they did not make it easy. Thomson required someone to be present for every part of the batch export process. Thomson’s Help Guide is not very detailed. Fortunately, the Doc.It implementation team was very helpful and easy to work with.

WHY DO YOU RECOMMEND DOC.IT?

We followed Doc.It for several years before making the decision to go with them. In 2017 we determined Doc.It portals, workflow, and their PDF Editor were needed. We totaled the cost of our existing separate applications and the potential cost of also adding XCM; this made the decision to go with Doc.It a no-brainer.

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

Compared to our Windows folders method, there has been an improvement in how consistently documents are stored – including where they are located. This helps the workflow process through reviews, signing steps, and the archiving process. Work binders are based on set templates which eliminates the need to create those folders – we always know where items will be stored and found.



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PRIMARY SOFTWARE USED IN THIS FIRM

Doc.It Suite
Thomson Reuters
CCH Engagement
Office365

24

Doc.It® licenses

Working remote with digital workflows

WHAT DID YOUR WORKFLOWS LOOK LIKE BEFORE DOC.IT?

We had a highly manual, paper-driven process. We walked folders and papers from one person's desk to the next. With Doc.It, employees are still getting used to no longer having stacks of paper piled on their desks.

WHAT DO YOUR WORKFLOWS LOOK LIKE NOW, AFTER IMPLEMENTING DOC.IT?

Work can be moved through the office quicker. We still have some employees that are working remote full-time, which would not be possible today if we did not have Doc.It's digital processes and workflows. With Doc.It and these processes and workflows, our employees are motivated to scan documents when they are received to work with them digitally.

HAS DOC.IT MADE IT EASY TO RETAIN OPERATIONAL EFFICIENCY WITH A REMOTE STAFF?

Absolutely! Without Doc.It we wouldn't have had the ability to track work, or move it around to the necessary employees that had work to do on the file, and then back to the office for the final stages like assembly, delivery, and archiving. We are very glad we had Doc.It in place.

“Despite being remote from the office and each other, Doc.It has made our work possible!”

NIETZKE & FAUPEL, P.C. CPAs:

Nietzke & Faupel was originally founded in 1957, but in 1983 Allan Nietzke, CPA and Don Faupel, CPA formed Nietzke & Faupel, P.C. Our firm focuses on agriculture along with tax and audit services. Our current managing partner Jeff Bushey, CPA is a member of the Farm Financial Standards Council, and our AG department has also developed benchmarks for dairy and cash crop operations. We work with a variety of business owners in the “thumb of Michigan” as well as AG operations throughout the Great Lakes states. We pride ourselves in providing our clients with information they can count on, so they are able to get their mind off the numbers and back to their business.

Doc.It

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