

Woodman White Olsen & Co., LLP

WHILE THE USE OF DOC.IT HAS IMPROVED STAFF PRODUCTIVITY, MY PRODUCTIVITY HAS ALSO GOTTEN DRAMATICALLY BETTER.

PRODUCTIVITY

Doc.It has enabled us to maintain important documents better, storing them in a more findable manner. When a document is needed, it is much easier to locate it using Doc.It versus how we used to have to page through file folders where you lost time due to having to read more. Part of the standardization process in using Doc.It Suite involves naming conventions applied to files. Because of this, we are finding we spend much less time searching: Documents are quickly found.

Since implementing Doc.It, the file prep time in most cases has decreased. The most significant impact is felt in my review work. The time I spend reviewing a file has decreased because all of the documents I need to access are always right there, properly referenced. While the use of Doc.It has improved staff productivity, my productivity has also gotten dramatically better.

One aspect of working with Doc.It that I really appreciate is being able to access files immediately without leaving my computer to search a paper file room. For example, if I am working with a client in a meeting room, I can answer inquiries easier due to being able to access their files at that moment from the computer in the meeting room. I never have to excuse myself from the meeting to locate and retrieve a file from the file room. With Doc.It, I have every file at my fingertips; I can find any file quickly.

PROFITABILITY

Our profitability has been positively impacted. Since implementing Doc.It, I have time to do more billable work in the same number of hours. We have had Doc.It since 2010. Since that time, it has been easier to take on more clients and we have not had to staff-up.



Location:
Lethbridge, Alberta

PRIMARY SOFTWARE USED IN THIS FIRM

Doc.It® Suite
CaseWare
Profile/Intuit Tax
Jazzit

20

Doc.It® licenses



Learn how Doc.It® impacts work in our firm

MITIGATION OF RISK

With Doc.It, our files are more organized and we can locate documents by far faster than before we had Doc.It. You can answer a question before it gets into a risk-based situation. Before Doc.It, when we had a paper-based system, there was no way to prevent having to go back to a client to ask for paper again. Because of Doc.It, we are retaining more and what we retain is well-organized. This mitigates the risk of missing a document.

Consistency, applying policy and document retention are important. Typically, everyone in our firm is involved in putting documents into the Doc.It system. When we adopted Doc.It, their implementation team addressed naming conventions and document retention policies. At our firm, we determined that the cost of using Doc.It's training program was less than our cost would have been to develop the naming conventions and document retention policies ourselves. The cost represented only one full day of the time it would require to establish policies for every type of document we were going to retain. Taking this approach was a smart move and a huge cost-savings. Doc.It has worked well for us.

When adding a second location, we knew that uniformity will be easier because the system already works. Because of Doc.It and the processes and policies it provides, this system is ready for the second location to use.

Before adopting Doc.It, we had a file room. Today, we are back-scanning to get rid of our paper file room. Back-scanning is mindless work but, nonetheless, we still have to exercise caution: We had accumulated 30 years of paper. Our paper file room was 40' by 30' with narrow isle ways: The cabinets are 8' tall. Back-scanning is going slowly, we are being methodical, and we might be 10 percent done. The quantity of paper documents we accumulated over the decades is staggering; determining how much you need to back-scan is a tedious process. We are happy to be moving forward as a paperless firm.

OUR FAVORITE FEATURE IN DOC.IT

The thing that I like the best about Doc.It is being able to handle a document fewer times. Once the document is scanned, I make a note and I am done with it: I don't look at it again. I maintain a box of documents beside my desk that has been scanned and is ready to be shredded. It is nice to see that box full and the piles on my desk are shorter now. Before Doc.It, some of the piles on my desk used to be two or more feet deep; now, they are a half-inch tall or less. That is a lot less paper to manage.

