

EPR Gordon C Ferguson & Co. PC

YOUR PROCESSES CAN ABSOLUTELY BE IMPROVED.
DOC.IT HELPED US TO SEE WHERE WE WERE AND WERE NOT EFFICIENT.

WHAT DROVE YOU TO INVESTIGATE DOC.IT?

One of our partners was referred to Doc.It by another firm that was using Doc.It. We desired to go paperless; Doc.It was a good fit.

WHAT IMPROVED IN YOUR FIRM AFTER IMPLEMENTING DOC.IT?

For us, the ease of finding information has been a great resource. For example, before Doc.It, when a client would call, we would have to call the client back after we found their file. With Doc.It, we just click the screen and the information is there.

We have been making great use of Doc.It's Workflow component for the last year or two. Before Doc.It's Workflow, we would send tasks with MS Outlook. Our process is much better today. With Doc.It's Workflow, we know where files are at and their status: Work-In-Process is much easier to track than before Doc.It. Doc.It has been very helpful in that regard.



Location:
Slave Lake, Alberta

PRIMARY SOFTWARE USED IN THIS FIRM

Doc.It® Suite
CaseWare ProFile Tax

21

Doc.It® licenses



Advice to partners or IT professionals considering Doc.It®

WHAT WAS YOUR BIGGEST CONCERN REGARDING DOC.IT?

While most might be concerned with change, we were not. We were operating in a paper-based environment and focused on increasing efficiency. Our biggest concern before buying into Doc.It was the inefficiency of our existing paper processes; any break in productivity is always a concern. Mr. Ferguson believed paper files were wasting money and time.

WAS DOC.IT A DIFFICULT CHANGE FOR THE FIRM?

People resist change, which can make it tough. Overall, implementation and training was handled well. The trainer came into our firm and taught us how to use Doc.It and how to use CaseWare better. Having good instruction on using Doc.It definitely bridged the change-aversion for staff.

DID DOC.IT HELP YOU WITH PROCESS IMPROVEMENT?

Yes. For example, with Doc.It Workflow, every file is in a Doc.It Work Binder. It is very helpful to know where any file is when you are on the fly. With Doc.It, you know at a glance where every task and job is at.

HOW DID THE IMPLEMENTATION PROCESS AND TRAINING GO?

It went well, as expected. There are questions about using Doc.It that arise periodically - as long as somebody in your firm has a good understanding of Doc.It, it is very easy to teach to others.

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

We did not change in our work; we changed our process when handling digital documents versus paper. Before Doc.It, we printed a hard copy as a final copy; today we batch print as our final copy. Doc.It is reliable and secure; documents will not disappear. Some of the benefits of having files in digital format include sharing documents via thumb drive or by email; it's far easier than moving paper.

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

The training is acceptable and works. The learning curve is not as steep as it appears. Once people using Doc.It have the understanding of what a dynamic document is, the software is very self-explanatory.

WHAT WOULD YOU SAY TO A PARTNER OR IT PROFESSIONAL CONCERNED ABOUT PROCESS IMPROVEMENT?

Your processes can absolutely be improved. What I like about Doc.It is it made us think about our processes and ensured we follow the appropriate steps. Doc.It helped us to see where we were and weren't efficient. Moving paper around in our office is not happening anymore. Doc.It makes you more efficient in processes as a whole.

WHAT WOULD YOU SAY TO A PARTNER OR IT PROFESSIONAL CONCERNED ABOUT IMPLEMENTATION AND TRAINING?

We had a little slow-down during the first year as we scanned everything to get the system in place. Today, we are far more efficient because information is instantly accessible and user-friendly. We follow similar processes we used when we were paper-based; we now use Doc.It to digitize and standardize it.

