

Hyatt Lassaline LLP

THE BIGGEST SECRET TO OUR SUCCESS HAS BEEN THE AVAILABILITY OF THE DOC.IT TEAM. FROM THE POINT OF INSTALL THROUGH TODAY, THE DOC.IT TEAM HAS BEEN THERE TO DO WHATEVER IS NEEDED TO RESOLVE OUR ISSUES.

We pride ourselves on being known as the firm that cares about our clients. We earned this reputation by being responsive and available to clients while also taking every client issue seriously, regardless of how big or small it is. It matters to a client that every issue is handled professionally and with care.

WHY WE SOUGHT OUT DOCUMENT MANAGEMENT SOFTWARE

1. Files were not being organized in a consistent way and documents would end up in a pile somewhere not yet filed, especially if the documents were a special project.
2. Responding to client requests was difficult if files could not be quickly located.

Before we brought Doc.It Suite into our practice, documents were organized and filed in many different ways, depending on who was handling each one. Every partner seemed to have a personalized way of organizing Windows folders. Filing documents in a consistent way was a challenge. For example, when Articles of Incorporation would come into the firm, it might have taken months to put them into the actual file. Some of the challenges this issue posed were files not being current and stacks of documents piling up.

We no longer have this issue because, with Doc.It, documents arrive – and paper documents are scanned in – and land in the receptionists' Doc.It Inbox, the temporary storage location. Once documents drop at this location, they are easily shifted into other binder systems like fx Engagement or CaseWare. Our receptionists are very efficient with filing because they do not like to see files residing in their Doc.It Inbox for very long.



PRIMARY SOFTWARE USED IN THIS FIRM

Doc.It® Suite
CaseWare
CCH Tax Prep

24

Doc.It® licenses



Learn how and why we chose Doc.It®

HOW DOC.IT SUITE HELPS US IN OUR DAILY WORK

Responding to client requests for documents

Before Doc.It, when a client requested financial statements, we used to have to go to the filing cabinet and hope the documents asked for were there. If we found the documents, we faxed them. This might have taken two days. If we did not find the documents, emails started flying around the office asking others if they had the file or document.

Today, with Doc.It, anytime clients are asking me for a document or figure, I will say, “Give me four seconds and I will have the answer for you.”

Using Doc.It, I have often already accessed the document before a client is done asking a question, so I am instantly able to provide an answer. With Doc.It, my access to every document for every client is literally that fast.

Managing tasks and not making clients wait while partners or staff members are away

Another way Doc.It has helped us is evident when clients call asking for someone who has stepped out. Our receptionists are trained to ask clients if there is something someone else can help them with, rather than making clients wait. For example, clients might call needing a copy of a financial statement sent to the bank because that is where they are and they need to share that document. The receptionist can literally send the document immediately. This happens quite frequently. As a matter of fact, a few minutes ago I handled a call from a client requesting several years of financial statements. Within five minutes after that call, the receptionist had already sent the client an email with those statements attached, and the task was complete.

OUR DECISION TO GO WITH DOC.IT WAS BASED ON THESE CRITERIA:

- We were starting to grow beyond each person saving things in different ways in different folders in Windows. We had no protocol for storing certain data files. I was frustrated and looking for a file retention and file storage protocol solution. The solution was Doc.It's Archive.
- Doc.It knew the flow in the accounting firm and understood our environment. They had protocols that worked. For example, one of the tougher aspects we faced was moving away from the paper mind-set for reviews into a PDF version. Doc.It let us know how to review a file and suggested how to add annotations to show a file had been reviewed.

