Arsement Redd & Morella

EVERY DOCUMENT IS EASILY ACCESSIBLE AND AT YOUR FINGERTIPS

Arsement Redd & Morella are a traditional firm servicing small businesses by providing a "controllership by the hour" approach. A cornerstone of their original business model is to focus on providing services that clients want, rather than what they need. The firm just celebrated its 25th anniversary with all of the original partners. A mixed array of applications are used at the firm, creating a "best-of-breed" software environment. Doc.It was chosen as the optimal solution due to its ability to work in this environment. Their firm is in its third year of using Doc.It.

OUR SCANNING MODEL

The firm is utilizing primarily a "mixed" mid-point scanning process, not front- or back-end. Staff generally scans documents as they do the work. They share access to a pool of six high-speed scanners (60 PPM multifunction devices). Some are using the document recognition application, which does a good job of recognizing documents and puts them in the proper folder in the binder. Review notes are either recorded using a traditional manual approach, in a Microsoft Word document or some enter the notes directly into the Doc.It Binder. The Doc.It PDF Editor provides many of the annotation tools found in Adobe Acrobat. Each staff person can setup their unique signature stamp with color designations to identify them as the preparer or reviewer.

BENEFITS ACHIEVED

The firm prides itself on not hiring administrative staff, per se. Instead, the professional does many of those types of tasks individually to avoid having to hand off tasks back and forth. Now that they have Doc.It, many of these tasks have been automated. The first thing they noticed is the "little man delivering the boxes containing reams of paper stopped coming by." Offsite storage is down 50 percent already and will be reduced to zero (0) within two years, due to the fact that they are cycling through only electronic files going forward.

Referred by K2 Enterprises

Location: Lafayette, Louisiana

PRIMARY SOFTWARE USED IN THIS FIRM

Doc.It® Suite

Lacerte Tax

Thomson Reuters Trial Balance

Engagement CS

QuickBooks

45
Doc.It® licenses

Learn how Doc.It® impacts work in our firm

FAVORITE FEATURES OF DOC.IT

Immediate access of documents

A year ago a client notified the firm that he received an IRS tax notice requesting charitable contributions documentation. The firm was able to respond with all the requested documents within 30 minutes without ever having to leave their desk.

Able to share so much more

Files in Doc.It are accessible even if someone else is using them, as compared to paper documents.

Printing

Printing directly to Doc.It reduces the need to scan.

LESSONS LEARNED

Implementing Doc.It resulted in a very significant benefit as a by-product. It caused them to standardize their procedures across the firm. "Everybody has to do it the same way." Hiring an independent industry consultant (Dr. Bob Spencer, K2 Enterprises) was the best investment they made. After going to a number of conferences and viewing demos, they wanted someone to come in and provide them with an objective assessment of their options. A common misconception is that a DMS will help you work faster. It doesn't necessarily do that, except in terms of document retrieval. It does make you more efficient as a firm overall.

All of your process and procedures must be standardized and they have to be followed so that the DMS actually functions. "You have to pay attention to the rules." You have to be flexible. Regardless of how much you plan ahead of time, something will come up that you have to adapt to. After startup, they realized there were some things that would have to change. "Overall, we are are so much better off, I can't imagine going back"