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**From the July 2013 Issue.**

Document management seems to be a recurring theme for my practice this year. It may be because there are so many improvements in products. It could be that document management can be resource intensive to implement and that it raises so many procedural and cultural issues. It could be that the promise of document management has not paid off for you and your firm. You might be one of the lucky ones that are in the position that you couldn't live without your paperless system.

Without exception this year, every consulting engagement I've had in either CPA

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on every system. Why?

Firms frequently try to use the wrong tools in the wrong way to accomplish a job. We are amazed to see firms using engagement managers for long term document storage or to revert to paper methodologies because the belief is that the process is faster when the real issue is lack of training or a poor process. We've seen document management systems used as substitutes for 1040 Workpaper and Engagement Trial Balance management. We are also amazed when the right tools are in place and not used by team members. Why?

### **Why, Why, Why? Should We Change?**

New document management implementation projects are being considered again. The discussions include these key areas:

1. Local storage, backup, networking and transfer capacities needed to support document management as well as the cloud options.
2. Integration of workflow.
3. Integration of portals.
4. Improved economic conditions are making employees harder to find again and document management is seen as a productivity tool.
5. There are ample capital budgets to make expenditures.
6. Some of the new paperless technology advances are attractive compared to the technologies in use. We have seen improvements in most of the document management products, including some very notable advances in products like Doc-It, SmartVault and eFileCabinet, and even products with larger installed bases such as CCH Document are seeing usability changes.
7. Firms that have been using Do-It-Yourself (DIY) paperless techniques are starting to have record retention issues.

## 8. Management teams are looking at productivity gains from software and systems

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firms jump in and out of the paperless technologies including document management, engagement managers, 1040 workpaper products, time & expense management, and accounts payable automation.

### **So, What Should You Do About This?**

Think. Think about your firm strategy. Think about your process. Think about your client experience. Think about the best way to do the work. Think about alternatives. Think about how to implement, train and make your vision a reality. Ask for help from team members, peers, associations, software providers or consultants. You and your team members can't know everything about all software, processes and best practices, but you can certainly learn them. Filter the advice with your vision, needs, and a practical, simple eye on how to do the job in the easiest way possible.

If you are having issues in a particular area, consider the best, simplest and most consistent way to accomplish the task. Look for shortcuts that don't compromise quality. Look again and again. Look in other places, sources and industries to find innovative ways to solve the problem. Look for contracted services that can show you a better way. CCH, Thomson and Intuit all report that they have had to create services to show firms a better way, because they were not discovering the methods on their own. Using knowledge from associations who have been through the process is another great resource. However, as most of us have learned, not every peer or vendor resource has every answer and things are not always as they seem. Even if things aren't perfect from your resources, take the best ideas that work for you, and apply them.

So, you are ready to look at document management again and you want to know where to go. Think about document management options holistically. Consider the whole problem and then tackle a small part at a time. Where should you look? This list is not intended to be comprehensive, but merely reflective of products that are in the

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is lack of compliance. A fourth error is expectations that are unrealistic.

Most projects seem to take more time and money than we think they should.

Document management is certainly prone to this because a proper implementation is not easy. However, a document management system that is running correctly is priceless. Is that how you feel about your paperless efforts? If not, take action to make the improvements needed!

Firm Management • Technology

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