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D E W A R
M E E K S
+ E K R E M P C
Certified Public Accountants

Top performing firms are leveraging technology to build efficiency, save money, bring value-added services to clients, allow for easier communication with clients and staff and better manage the firm's practice and processes. These firms share their best practices so you can follow the road map they provide and join them in the winner's circle.

When accounting and bookkeeping firm Dewar Meeks + Ekrem decided it was ready

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management, but it is not only saving the firm money, but there is now a more efficient and more secure system in place.

Moving to CCH Axcess saved the firm \$40,000 a year over the cost of maintaining the server farm and the software themselves. “Just the cost savings from the change in infrastructure needs made it kind of a no-brainer,” said Ekrem. “That \$40,000 could be better utilized. CCH Axcess could give us what we needed without sacrificing efficiency.”

Three years ago, the firm spent two months getting ready for the transition, but the planning and the thought process that went into making a significant software change goes back so much further. “When we first changed from the old paper way of doing things, along with inputting the information into a tax engine, we saw that there were a lot of things in that paper process we love and that work really well,” said Ekrem. At that time, the firm members made lists of what they liked about the old paper process, the methods and solutions they did not want to be without. The goal was to “automate so that it has the same feel and flair of what we like, but with the ability to find things quickly,” explained Ekrem.

That process worked so well that the firm used a similar method when getting ready to switch from CCH ProSystem *fx* software to CCH Axcess. “We dissected our process from start to finish. Starting with 1040s, state returns, financial statements – we set up a template for each kind of job we do – there were about 30 different kinds of jobs,” said Ekrem. With the help of Wolters Kluwer trainers, the firm was able to combine new best practice techniques provided by Wolters Kluwer with the step-by-step processes that were already working well for them, and the result was a system that fits the needs of the firm.

“We worked hard with the Wolters Kluwer trainers and implementation people to make sure the transition would be as smooth as possible from the end user

perspective,” said Ekrem. “The conversion itself was swift. We closed our office on a

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they flood to the sunny parts of country. During tax season they're often away, so our new system has allowed for better communication in a more secure way. We can still get their tax return to them wherever they are.”

When asked about favorite things in CCH Axcess, Ekrem was quick to respond. “Previously, a customer would call and ask about a tax return – we didn't know where it was in the process, when it was going to be finished, how long it had been sitting around – it took everybody a lot of time. Now it's very clear who has the file and where the bottlenecks are in the office. It's easier to allocate work.”

The review process has improved as well. “I like the screen use – the ability to make my screen any size I want,” said Ekrem. “I can pop out an input section into another area or another monitor. It's easy to identify overrides. The way CCH Axcess uses bold colors, is much more dynamic and it automatically customizes to whatever screen you open. I can identify things faster and that saves me time. The diagnostics are easier, I can drill down faster to find the source of what's in a field. I can have three years open at once on my screens if I like, I can also open multiple tax returns. If I can save a few minutes in every return it adds up really quickly.”

Ekrem has clear memories of what life was like before the firm started using tax and accounting software, but those memories are getting hazy. Even the transition to CCH Axcess three years ago is now drifting into the memory archives. “I really like innovating and making our product smarter, better, and faster. Doing a tax return is a commodity, we can only charge so much for it. I want to make sure we're using our staff intelligently rather than just going through the paces. CCH Axcess saves us a lot of time and money.”

Find out how you can leverage CCH Axcess to meet your needs. View a demo or request a one-on-one consultation today.

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