

DOCUMENT MANAGEMENT & WORKFLOW trends revealed

Firms of all sizes weighed-in on document management and workflow in the 2nd Annual Accounting Firm Operations and Technology Survey.

Accounting professionals reveal the top challenges of managing their practice and top technology challenges overall



30% Identified workflow as a ‘top challenge of managing their practice’ and ‘a top technology challenge’

and **68%**

Have no workflow software and will continue to suffer these challenges

67%

ARE RISKING IT ALL

If litigation involving a client requires eDiscovery

This group ‘does not have’ or ‘does not follow’ a document retention policy for purging digital files.

What is your peers view on technology spending?

65%

“It is a competitive advantage or revenue neutral”

35%

“It is an expense”



The Gap Widens

In 2015, 15% more accountants have document management software

2014

70%

2015

85%

78%

of accountants believe an effective way to control costs is to examine the firm for technology, process, or workflow inefficiencies

More than

500

Respondents agree your firm will benefit from document management and workflow software if...

- ☒ Workflow is a technology challenge
- ☒ Increasing efficiency throughout the practice is a priority
- ☒ Staying on top of workload is a challenge in managing the firm
- ☒ The firm does not have or does not follow a document retention policy for purging digital files
- ☒ You have not fully implemented document management and workflow software
- ☒ You have not yet examined your firm for technology, workflow or process inefficiency
- ☒ Technology spending is viewed as a competitive differential

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