

TOP 12 SIGNS INDICATING YOUR FIRM NEEDS DOCUMENT MANAGEMENT AND WORKFLOW SOFTWARE

1. You schedule in Excel.
2. Your workflows are on white boards or taped to the wall.
3. You send tax documents via email without encryption.
4. Staff members do not have access to project-related email.
5. Documents are misfiled or you have to leave your desk to locate them.
6. You have to take notes and call a client back because you have to go find their file.
7. You have paper files and file cabinets everywhere in your office.
8. You are out of office space and your file room is maxed out.
9. You cannot work from home because files you need are at the office.
10. You need to contact staff when they are out-of-office to locate documents.
11. You avoid thinking about the cost and risk of off-site storage, management and retrieval of client documents.
12. Your disaster recovery does not include details about how you will replace your paper files.

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and Download these Free Resources

WEBINAR: OPTIMIZING WORKFLOW & DOCUMENT MANAGEMENT EFFICIENCY

For Accountants & Tax Professionals

WHO SHOULD ATTEND? Those who want to realize one or more of the following benefits:

- Improved client service.
- Improved workflow and efficiency.
- Improved security.
- Use of time saved to build high-value services areas.
- Improved workflow and added efficiency; pushing more work through the firm.
- Never miss a deadline.
- Enhanced email management.
- Data accessible in one place, documents are not lost.
- Reduce the number of software applications in the practice without sacrificing functionality.
- The trusted source in the event of document discovery orders or litigation.
- Easy to onboard and train new staff.

RESOURCES

- ✓ **Case Studies:** Learn how practitioners overcame document management and workflow challenges
- ✓ **Top 20 Questions** to Ask a Document Management and Workflow Vendor
- ✓ **White Paper:** Resolve Workflow & Efficiency Challenges and Processes Jeopardizing Data Security



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