

Accounting for space, time and efficiency at Williams, Pitts, & Beard

Williams, Pitts, & Beard, PLLC is a well respected and distinguished CPA (Certified Public Accounting) firm, providing a myriad of financial, accounting and litigation services, ranging from corporate and personal tax planning and preparation, to cash flow, budgeting analysis and estate planning.

Williams, Pitts, & Beard, of Hernando, Mississippi, services over 1,000 individual clients and over 250 commercial clients a year. The company prides itself on providing close, personal attention to clients, and aims to improve its offerings with a continual investment of time and resources in advancing technology.

The Business Challenge

The amount of paper that staff had to retain for every client they dealt with was piling up. In fact Williams, Pitts, & Beard had a complete office wall dedicated to the storage of client records in ten large filing cabinets.

“We simply ran out of space and had no more room to put anything,” said Danny L. Williams, managing partner at Williams, Pitts, & Beard. “While we have to maintain documents for our daily reference and access, the problem was made greater by the fact that legally we have to retain documents and files for up to seven years.”

As regulations and conditions in the tax business change frequently, accountants need to be able to access files as quickly as possible. On a day to day basis, procedures to complete a tax return, for example, were complicated by having to manually hand over paper documents, track previous folders, retrieve other information and file all related paper-work.

The Solution

With these requirements in mind, Williams, Pitts, & Beard began a search for a solution that was not only functional but also easy-to-use, and simple to implement. Additionally the management team did not want something that took up a lot of IT resources and it had to be cost effective.

Having met with a number of document management vendors, Williams, Pitts, & Beard selected Computhink's ViewWise™ application. ViewWise had all the functionality required and met the company's compatibility requirements, offering an open architecture solution with minimal IT resources.

ViewWise is a robust document imaging/management system designed to reduce users' dependency on paper and to streamline the document archiving, searching, retrieving and annotating process, on a SQL server 2000 running NT 4.0.

"We wanted to integrate a proven solution, with proven results. We saw ViewWise live and were able to see the functionality we had envisioned in action," explained David Pino, network administrator at Williams, Pitts & Beard. "Computhink also offered the personal approach we were seeking - providing us with the kind of partner we wanted to work with as our business grew."

The Results

In July, 2001 Williams, Pitts, & Beard tested all the components, and then transitioned its users to a full document management software environment within a week.

Since then, the company has moved over 1,000,000 paper documents into the ViewWise system, and electronically manages over 98% of previously paper files. Williams, Pitts, & Beard has eliminated the wall of filing cabinets it had, and made sustainable reductions in hard cost spending associated with copier and fax systems.

More importantly, staff have benefited from an unexpected improvement in productivity. Prior to Computhink and ViewWise, the accounting process, while efficient, took up to 30 steps, from originating a document to handing off to someone else, all the way through filing and retrieving documents. This took a significant amount of time and involved many people in different departments.

Williams, Pitts, & Beard now originates needed documents at the desktop and automatically archives them directly to ViewWise through a print-to-driver. Staff can then share documents to other users through ViewWise. Document images are available within seconds with a simple click of a mouse – enabling any member or other departments with appropriate security credentials access to the files. This means added support for various business initiatives, improving communication and customer service.

The Benefits

“We could have never imagined the type of results that we have attained from this solution,” explains Rebecca A. Beard, partner. “We depend greatly on our employees and how quickly, efficiently and accurately they can complete a project like a tax return. ViewWise has eliminated at least 80% of the time needed in our processes giving our employees more time to spend cultivating relationships with our clients.”

By freeing up physical work space, Williams, Pitts, & Beard has been able to replace the filing cabinet area with a new area for more employees, improving the working environment at the firm.

"Overall, Computhink has provided us with a cost-effective solution that offered all the functionality we needed, without requiring extensive programming or customization," concluded David Pino.

Williams, Pitts, & Beard now plans to resell the solution to other CPA and legal firms through its IT consulting division, having seen the improved productivity and success of this initial implementation.