Best Practices for a Digitized Archive

As one of Canada's more prestigious public accounting and business advisory firms, Soberman LLP is well-versed in the use of accounting and general office management software. But as Soo-Ling Huang admits, "we were using CaseWare and TaxPrep extensively, but still printing hardcopies at the end of the day. And that just seemed silly," she laughs. "BAI is the guru of CaseWare, so it was a no-brainer to get our paperless ducks in order."

> *"Going forward we're looking at a minimum of 30% to 50% increased efficiency in terms of staff time. There's not just an 'expectation' of a benefit; we can actually see it happening, going forward."*
>
> Soo-Ling Huang
> Senior Manager
> Soberman LLP
> Toronto, ON

Operating out of three floors at its midtown Toronto offices, staff consistency in terms of how client files were processed and worked, along with more reliable access to information stored throughout the firm, was crucial to any meaningful transition. "One," wondered Soo-Ling, "how do I access the information I need? And two, are people two floors up working and securing their files in ways different than my floor? BAI gave us the opportunity to identify where we were working inefficiently and where we could realize effective and undisruptive change."

The ability to suddenly have scores of accountants and administrative staff all working within the same system of policies and protocols has garnered Soberman an annuity that is sure to endure and accrue, says Soo-Ling. She may not be able to put a dollar figure on how **BAIWay ClientDocs**™ helps express the quality of her firm's professionalism and dedication to its clients, but Soo-Ling knows that as Soberman more easily anticipates, coordinates and responds to the needs of its clients, its value is enhanced exponentially.

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"The plan is to be more efficient by having more information at your fingertips," says Soo-Ling of the firm's goal of becoming pre-eminent in its ability to quickly satisfy client requirements. "We know this is very important and has great value."

Not a day passes when Soo-Ling doesn't see the value and benefit from working an electronic file, compared to paper. "You do one journal entry and it likely affects five different places," she says with some exasperation. "So you've got to reprint five different documents. A one minute journal entry turns into a half-hour paper-practice later. So that's what I hear from our staff now [that Soberman has bought into **BAIWay ClientDocs**™]: '*My entry is now one minute and not this long backtracking process.*' So that's one of the things the staff cheers about."

Of equal worth is the growing digitized library of completed client files Soberman is starting to create in its Archive. Using **BAIWay ClientDocs**™ protocols, the firm can access, shift and prioritize this data to suit any contingency. "The Archive is what I see as the database," explains Soo-Ling. "It's the pulse of the company that we can access with ease, which is the most obvious long-term benefit. So populate the Archive and you have a library of huge value."

In the end, Soo-Ling sees **ClientDocs**™ as an eye to the keyhole, helping to monitor the best practices of the firm. "BAI provides us the opportunity to evaluate and see where we are inefficient. So BAI shines a spotlight, which is great."

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