

Don't Be Caught Without Workflow in Your Paperless Solution

Many believe that workflow and document management should be separated like oil and water, only hoping that one day they can coexist cohesively. Here are some details to consider when combining a workflow and document management system.

Document management has many known benefits when trying to reduce overhead, but is going paperless enough of an effort to save costs for the small office? Having access to electronic documents is not the only way to save money. Improving the way you work has far reaching benefits and higher cost savings than just getting rid of paper. The real savings come when the office is transformed by the centralization and integration of documents and workflow.

In a small office, the owner ultimately does most of the management of clients, staff, and workflow. When staff need new assignments or have questions regarding existing work, they come to the owner for assistance, creating constant interruptions to the owner's valuable time. For example, your client mails you an IRS notice regarding an error on a tax return. You scan it into a document management system or server folder and hand the original to one of your staff and discuss their next actions. They take the client's file, complete the work required and log their time. In many firms, this work is tracked using Excel spreadsheets, Outlook and a variety of other applications.

This becomes very costly to the entire firm, as the owner usually bills out at the highest rate for the firm. What if small office owners had a tool that could radically change the way they delegate and manage? A tool that provides a work list that links staff to workflow and documents, and a method for owners to improve delegation of tasks. A Practice Management Suite could be the tool small business owners are looking for.

Now, let's consider a different methodology using one tool, one piece of software, a Practice Management Suite. First, we take the work process we are currently using and define the tasks or steps involved. Define if the steps are concurrent or unique and if one or many staff members perform the tasks. Now, define if we will be handling client files/documents, or scanning. Let's apply these steps to tracking a government notice like an IRS notice for a client. You would start by creating a project, selecting IRS notice for your client with an applicable due date. Then scan in the notice, shred the original, file it or return it to the client, depending on firm policy. Next, assign a task, like reviewing the letter, to a staff and log the time spent on administration. Once received by the designated staff member, they will document any questions, note specifics and send it to the appropriate person for resolution. The next step might include creating a response letter; this should be created, stored and tracked with the project as a separate document. Once the document is completed, it will be assigned to a reviewer and time will again be logged. The reviewer will make any corrections, send to administration for delivery and log their time. An entire work process has now been created, tracked, and completed using a workflow system, paperless procedures, and time tracking for productivity reporting and client billing. No meetings, no emails, and no unnecessary communication; just work completed and time billed.

With a Practice Management Suite, you or your staff can also track the progress of a project; create letters and alert staff to pending work and deadlines. Practice Management software allows each staff member to be a part of the process, eliminating the need to hunt for information or wondering if you are meeting deadlines. Whether you bill by the hour, flat fee or retainer, all time is logged, alerting us to billing goals, productivity monitoring, and ultimately eliminating giving our time away for free.

Having the right Practice Management Suite that tracks document review until completion while tracking each step, time used helps eliminate wasted time, money, and energy. At any time, you can see all open projects assigned to your staff members, the time they have spent on it, the original IRS

notice and their correspondence. The best Practice Management Suite workflow methodology ensures that documents, time tracking, and workflow are managed together.

This kind of integration can be carried into every aspect of the office. Keeping client information, staffing and workflow tightly linked, empowers the small office to become more remunerative. By increasing efficiencies, the firm can take on more work, increasing revenue for the same labor costs.

Randy Johnston is a nationally recognized educator, consultant, and writer with over 30 years experience in Strategic Technology Planning, Systems and Network Integration, Accounting Software Selection, Business Development and Management, Disaster Recovery and Contingency Planning, and Process Engineering.