



Accountants Access Information Faster, Enjoy Collaboration, Save 20 to 30 Hours Weekly

Overview

Country or Region: United States

Industry: Professional services

Customer Profile

Bodtke & Stewart is a Peoria, Illinois-based certified public accounting firm. It employs eight people and serves about 325 clients.

Business Situation

Bodtke & Stewart struggled to access information from a mix of digital and paper documents and lacked a unified document-management solution.

Solution

The firm digitized 46,000 paper documents, which it tagged and indexed along with its existing digital documents, and made the content accessible through Microsoft SharePoint Server 2010.

Benefits

- Rapid access to information
- Stronger collaboration
- Savings of 20 to 30 hours weekly
- Enhanced relationships with clients

“With the help of the document-management solution we implemented on Microsoft SharePoint 2010, we are saving 20 to 30 hours weekly on information access.”

James Bodtke, Cofounder and Managing Director, Bodtke & Stewart

Accounting firm Bodtke & Stewart does an excellent job of serving hundreds of clients and managing millions of dollars with a very small staff, but the firm is always seeking ways to improve service and create a more welcoming internal work environment for its employees. To that end, the firm streamlined information access and content management by converting 46,000 paper documents to digital format and making the content in them accessible through a Microsoft SharePoint Server 2010 file-share crawl. As a result, Bodtke & Stewart accountants can answer client questions faster, collaborate more effectively, and provide higher-quality client service—while saving 20 to 30 hours weekly in accessing information. Bodtke & Stewart will expand on these productivity advantages by deploying a SharePoint 2010-based extranet for further efficiencies in client communication and collaboration.



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Situation

Bodtke & Stewart is a certified public accounting firm founded in 1982 and headquartered in Peoria, Illinois. The firm provides services in accounting, auditing, tax preparation and consulting, pension management, business valuation, and litigation support, and it does so in a highly efficient manner. Just four accountants working half to three-quarters time and three support staff serve a client base of nearly 325 individuals and organizations.

Enabling its accountants to be employed at less than full-time enables Bodtke & Stewart to differentiate itself from many other accounting firms through its strong focus on creating a family-friendly employment environment. But that environment does pose challenges, most commonly the phone call from a client with a pressing question that always seems to come just after his or her accountant has left for the day. This makes Bodtke & Stewart highly dependent on effective collaboration among staff members. And, just as at any other accounting firm, effective collaboration at Bodtke & Stewart is highly dependent on easy access to the documents and details that hold the answers that clients need.

Until recently, however, gaining access to these documents and details was not necessarily easy, because so many of the firm's records were maintained in paper format. “Most of our clients are individuals, families, and small businesses, and most of their tax-related data comes from explanation-of-benefits reports, IRS documents, vendor invoices, credit-card statements, and so on,” explains James Bodtke, Cofounder and Managing Director at Bodtke & Stewart. “As a result, we have amassed a large

volume of paper documents: 600 horizontal feet of them, to be exact, stored in file cabinets that occupy a room the entire length of our building.”

Solution

In mid-2010, Bodtke decided to address the document-access challenge by converting existing and incoming paper documents to digital files and implementing a solution to make those files easily accessible by the accountants. With the help of support staff, Bodtke installed a high-speed TWAIN-compliant scanner and began converting 46,000 paper documents into OCR PDF files equivalent to 130 gigabytes (GB) of content. The firm later added this content to 200 GB of existing digital content on its Windows Server 2008-based file share.

The Value of Compatibility

To help select, deploy, and support a solution for managing content, Bodtke engaged consultants from Infogenic Solutions, a member of the Microsoft Partner Network with Silver competencies in portal, collaboration, and content management. For this solution, Bodtke and the consultants briefly considered using a product known as InfoDynamics, because it was recommended by the scanner manufacturer, but turned instead to Microsoft SharePoint Server 2010, because of the firm's long reliance on Microsoft technologies.

“We decided on SharePoint Server 2010 because we wanted the convenience of a solution that was fully compatible with our installed environment, rather than one that was proprietary, like InfoDynamics,” Bodtke says. “We also wanted to be prepared to take advantage of opportunities for

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integration between SharePoint Server 2010 and Microsoft Office Professional 2010, which we had begun installing as part of an upgrade from Microsoft Office 2007.”

Fully Searchable Content

In September 2010, Bodtke’s team began tagging and indexing its digital content for retrieval through a SharePoint crawl of the firm’s file shares. Using the Microsoft Visual Studio 2010 Professional development system, the consultants from Infogenic Solutions wrote two support utilities: one, based on Nuance OmniPage, that monitors folders for the presence of PDF files and automatically performs OCR-based tagging on the files, and another that adds indexing metadata to the PDF files to make the content of a given document easier to find. The consultants also built a user-facing application that runs in SharePoint Server 2010 and displays a list of recently accessed files.

The team completed the content tagging and indexing by mid-December, the start of the firm’s busy season. Today, more than half of all documents at Bodtke & Stewart are in digital format and fully searchable through SharePoint Server 2010 crawls; Bodtke anticipates that by 2012 the firm will have 90 percent of its content in fully searchable digital form. To ensure that all content is accounted for, the team set up one crawl of the file shares and another crawl of a public folder based on Microsoft Exchange Server 2010. The file-share crawl, which occurs every 20 minutes, indexes content in all newly added files. The public-folder crawl, which occurs every 20 minutes, indexes content in new email messages and other items that are external to the file shares.

Next Up: Integrated Workflow

To make the content-retrieval advantages of the internal solution more directly available to Bodtke & Stewart clients, team members also are creating a SharePoint Server 2010–based extranet, scheduled for deployment in mid-2011. And, with the upgrade to Office 2010, Bodtke & Stewart has set the stage for a future initiative to build an integrated workflow based on SharePoint Server 2010 and Microsoft InfoPath 2010, and to move digital content from the file shares to a full-fledged content-management system based on SharePoint Server 2010 and a Microsoft SQL Server 2008 database. With this initiative, the firm will make both current and historical email correspondence accessible through a SharePoint crawl, just as other digital content is today.

Benefits

Bodtke acknowledges some initial resistance at Bodtke & Stewart to the new approach to managing content, but says the accountants and support staff welcomed the change once they began to see the benefits for themselves. Those benefits include stronger collaboration, the ability to provide higher-quality service to clients, and efficiencies in accessing information that are reducing the time spent on this task by 20 to 30 hours weekly. Additional benefits will come once the SharePoint Server 2010–based extranet is fully deployed, namely, streamlined communications and collaboration with clients.

Savings of 20 to 30 Hours Weekly

Whether preparing a tax return or revising recommendations for a pension fund, Bodtke & Stewart accountants now access the information they need, when they need it, with little effort and almost no delay. “This is true whether an

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accountant is accessing information for one of her own projects or for a project belonging to a fellow accountant who may be out of the office when that pressing client question comes in,” Bodtke says. “Depending on the question, the accountant can provide the answer in seconds rather than minutes, or in 5 minutes rather than 20, for a vast improvement in efficiency.”

As Bodtke points out, considering the time that accountants no longer have to spend on searching file folders and archives, requesting information from someone else in the office, following up on such requests, finding that the information retrieved is redundant or out of date and having to repeat the search—and so on—improvements in efficiency are remarkable. “With the help of the document-management solution we implemented on Microsoft SharePoint 2010, we are saving 20 to 30 hours weekly on information access,” Bodtke reports. “For every one of our accountants, that comes to 30 to 45 minutes each day that can be devoted to more important matters.”

Perhaps the most important of such matters is what Bodtke describes as “evaluating the facts” of a given client’s tax situation. “To evaluate the facts so that we can help our clients make the best decisions, our accountants must have mastery of the content available to them,” Bodtke explains. “Being able to access that content with minimal time and effort, to efficiently mine the data, optimizes the accountants’ efforts to deliver advice that best serves our clients.”

Stronger Teamwork

The ability to more easily understand and evaluate the facts of a given project

also optimizes the accountants’ own work environment. “The family-friendly policies at Bodtke & Stewart are just part of the firm’s larger commitment to providing a workplace where accountants can fully realize their professional aspirations,” says Susan Skinner, Certified Public Accountant and Audit Manager. “With this solution, the firm enables us to focus less on chasing down information and more on putting that information to work to our clients’ advantage. The solution also helps us work more effectively as a team.”

Also supporting the team environment at Bodtke & Stewart is the application deployed as part of the solution that shows the most recently accessed files at the firm. “Through, this application, we can know at a glance which clients’ projects are in an active state, which accountants are working on which projects, and which documents are receiving the most attention,” says Bodtke. “The application helps me as a manager—and anyone else at the firm—to rapidly understand the work priorities of a given day.”

Greater Process Efficiency

As soon as its SharePoint Server 2010–based extranet is fully in place, Bodtke & Stewart will extend the efficiencies of information access and effective collaboration directly to its clients.

“Clients who come into the office with shoeboxes and stacks of paper documents will enjoy far easier access to the information in those documents, particularly when there is an IRS audit, a client has an urgent question, or a mortgage lender or bonding company needs historical tax-related data to make a decision,” Bodtke says. “With those paper documents fully digitized, and

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searchable not only within the firm but also through the extranet, clients themselves will be able to access the documents and content in them whenever a third-party review is required, and we will no longer need to be involved. We will avoid the legwork required for each and every information-sharing request, streamlining processes and enhancing our relationships with our clients.”

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