



**Kahn, Litwin, Renza
& Co., Ltd.**

**Certified Public Accountants
& Business Consultants**

AT A GLANCE:

>> Company:

Kahn, Litwin, Renza & Co., Ltd.

>> Location:

Rhode Island, two locations

>> Industry:

Accounting and related business services

>> Business Challenge:

Boost productivity by speeding up client response time and reducing storage space

>> Solution:

Create an electronic document management system and improve business processes

>> Results:

Cabinet NG serves as the single retention and compliance document repository for the accounting and tax departments

Accounting & business services firm implements an automated document management & workflow solution with Cabinet NG

CNG-SAFE delivers greater operational efficiencies, reduces physical storage space and supports compliance and retention requirements

Too much paper getting in the way of client service

Kahn, Litwin, Renza & Co Ltd. (KLR) is a 100-person, Rhode Island based accounting, tax and business services firm. One of New England's 10 largest and fastest growing accounting firms, KLR was eager to reduce their paper piles in order to more efficiently serve clients. The company decided too much time was being wasted retrieving client documents such as tax returns. Creating an electronic document management system was the best approach to achieve higher productivity and deliver more responsive client service.

Careful planning of a paperless future throughout the firm

Like most CPA firms, KLR is divided into Tax and Accounting Departments. The Tax department used Cabinet NG to go paperless in 2003 and the Accounting Department followed in 2004. This created a single unified information repository of both accounting and tax documents. The creation of a single repository enabled KLR to sustain its strategic document retention policies and meet high compliance standards.

“With Cabinet NG in place, KLR has found the ability to instantly share client information electronically to be an enormous productivity boost. We no longer experience paper bottlenecks as documents are routed throughout the firm.”

Peri Ann Aptaker, KLR
Director of Tax Services

KLR worked closely with Cabinet NG to design and implement an optimized electronic document management solution that took careful consideration of supporting technologies and provided the foundation for its strategic document retention policies.

Because Cabinet NG's solution could support organizing electronic files by both services performed and individual clients, KLR achieved maximum ease of use because the solution enhanced the current familiar filing structure. Further easing the transition to a paperless office throughout the firm, CNG-SAFE's compatibility with virtually any type of document format meant all information could be consolidated into one organized and easy-to-use system. Now, all faxes and emails go straight into a centralized repository of business information and are filed into CNG-SAFE's highly organized cabinet structure.

"In just two years, KLR replaced its giant file storage room with 14 desktop workstations. We can access a client's file in seconds.

CNG allows our team access to client files from either office anytime!"

Peri Ann Aptaker, KLR
Director of Tax Services

KLR also tied its networked multifunction printer (MFP) to CNG-SAFE. Using a MFP enables users to print directly from their desktops or scan documents onto the network server. CNG-SAFE was configured to automatically pick up the scanned documents and send them to the user's workstation. Other benefits of using a MFP in conjunction with CNG-SAFE include tracking usage so costs can be billed to the client, as well as eliminating the need for duplicate copies and scans once the document enters CNG-SAFE.

Client Service Through Information Sharing is a Huge Benefit

Cabinet NG ushered in a new era of shared information that improved document workflow and accelerated business processes for KLR. "People trails" – the chasing down of information held by a single individual – were significantly curtailed because client documents and data are securely shared and easily accessed (with proper authorization) through CNG-SAFE's central electronic repository.

"With Cabinet NG in place, KLR has found the ability to instantly share client information electronically to be an enormous productivity boost. We no longer experience paper bottlenecks as documents are routed throughout the firm." according to Peri Ann Aptaker, the firm's Director of Tax Services.

Firms are often reluctant to change standard paper-based operating procedures because of the pain and disruption associated with most technology transitions. However, the ease of use and dedicated training & support Cabinet NG offers allows companies to go paperless as part of a smooth transition with minimum disruption.

CNG-SAFE is the most advanced electronic document management solution that files and integrates with Intuit's QuickBooks, making it a key choice among accounting and related businesses.

© Cabinet NG, Inc. 2007

