

*"As the only scanning device in the office, this machine is a real workhorse. Although we have other printers in house, we primarily use the Document Centre 460."*

**Barry MacQuarrie**  
Director of Technology Solutions, KAF

**Let's see what Xerox can do for you.**

Xerox helps professional services firms design and manage key document processes for the greatest possible efficiency, productivity and customer satisfaction.

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THE DOCUMENT COMPANY  
**XEROX**

**Case Study**

Document Imaging and Management for CPAs, consultants and other professional services firms



## Partners like the way their bottom line looks.

### **New solution helps KAF recover some pricey real estate.**

At KAF, the combination of DocuShare software and the Document Centre system saves space that once required file cabinets in the office, as well as in off-site storage facilities. And at \$23 a square foot in the Boston area, that turns into real dollar savings.

"We now save digital PDF files instead of hard copies for our own files," said Albrecht. "And as long as I know a key word from a document, I'm always able to locate it."

### **Scanning capability enables a new service.**

MacQuarrie explained that, in the past, when a client sent a source document to the firm, the CPAs would process that needed information manually and send the document back.

"We never kept copies of the source documents because we simply didn't have room for them," said MacQuarrie. "What's different today is that we scan every source document and act as a digital repository for our clients."

In the spring of 2001, KAF moved about 8,000 Word and Excel files into DocuShare software. With the exception of audit workpapers, KAF has started capturing everything else into DocuShare software.

"That means 100 percent of the paper coming into the office is scanned," said Albrecht. "And these documents don't leave DocuShare. If my client calls and needs information from an old tax return, I'm able to retrieve it instantly."

### **Solution provides numerous benefits to CPAs:**

- Positive return on investment.
- 24/7 access to critical business information.
- CPAs can access electronic backup copies for use at client locations.
- CPAs can create the structure of the Document Management System around the firm's own business process.
- Security features let CPAs establish who can view or update specific files.
- Consolidation of assets saves office space.
- Easy access reduces time spent looking for documents and facilitates true knowledge sharing.

# Xerox helps KAF master the flow of information from paper to electronic and back again.



*"Immediate access and retrieval of files is a godsend for a CPA."*

**Mark Albrecht**  
Partner, KAF



**XEROX**  
Worldwide Partner

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# Xerox confronts CPA firm's paper monster.



## The Challenge

- › Find a cost-effective and quicker solution to scan, store, share and retrieve hard-copy and electronic documents.
- › Add more value to services performed for clients.
- › Leverage technology to generate additional revenues.

## The Solution

- › Install digital multifunction equipment and user-friendly software package to allow instant access and retrieval of documents.

## The Results

- › Added ability to respond to customers in "real time."
- › Eliminated 75% of overhead personnel dedicated to copying, printing and filing.
- › Improved partner and office staff productivity.
- › Began offering clients hosted safekeeping of documents such as past tax returns, lending contracts and mortgage documents.

KAF Financial Group is a fast-growing, full-service accounting and consulting firm outside of Boston. Like many accountants, they operated on the time-honored principle: if it's paper, file it. Out of that process grew one of their greatest challenges.

"I can't count how many times I asked my secretary to get a file and it was like asking her to enter a black hole," said Mark Albrecht, a KAF partner. "It would take forever to find, if, in fact, it was ever found."

"We had six full-time staff copying, printing and retrieving documents. We were running out of space and we were simply choking on the paperwork."

### Finding a way to deal with an avalanche of paper.

KAF needed to find a more cost-effective way to create, store and retrieve large hard-copy files, many of which had to be modified every year.

From January 1 through April 15, for example, the firm was busy preparing over 1,200 individual and corporate tax returns. The volume for each return could range anywhere from 75 to more than 500 pages. The firm would also print 300 to 400 financial statements of up to 25 pages each. It would take weeks to properly file all these documents and to return source documents to their owners.

The firm looked to Xerox for a solution that would reduce the amount of time spent printing, filing and retrieving documents.

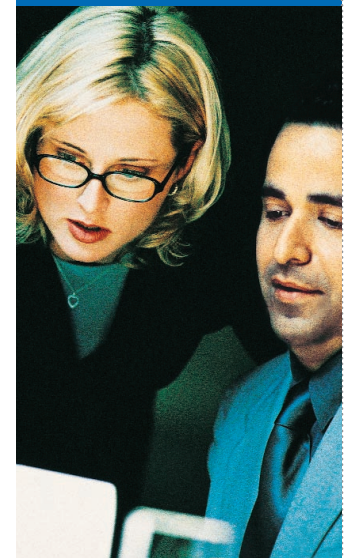
## Solution combines Xerox hardware, software and know-how.

After visiting KAF to discuss the firm's specific needs, Xerox recommended installation of a Document Centre 460 system, including **FlowPort™** and **DocuShare®** software. This multi-function technology, combined with the easy-to-use software, provided a system that could copy, print and scan information to electronic storage for easy access, control and Web-based sharing throughout the firm.

According to Albrecht, the biggest benefit for a CPA is not so much being able to convert documents into digital files, but being able to easily retrieve them. While FlowPort software makes it very easy to scan a document into the electronic file system, DocuShare software puts all that digitized information at the CPA's fingertips.

"A great thing about DocuShare software is that we were able to build our own client architecture into the system to set it up in a way that would work best for our specific needs," said MacQuarrie. "Within six months after installing the solution, we had a very well defined system that had everybody up and running and reaping its benefits."

**Manage knowledge faster, easier, better.**  
FlowPort™ software enables the integration of paper documents into an electronic workflow via a network digital device, such as a Document Centre. Its unique interface lets users access and control documents without using a PC.



## DocuShare

**Make knowledge available to everyone.**  
DocuShare® software is a secure, Web-based solution for managing documents and many other types of content. Simple to install and use, it provides a convenient environment for authorized users to create, share, access and retrieve scanned and electronic information immediately and without leaving the desktop.



"I think DocuShare is a wonderful product ... easy to use, very flexible and requiring little training."

Mark Albrecht Partner, KAF