



FileVision™ document management helps Access Consulting go with the flow from one cost-segregation study to the next

Document Management and Imaging improves customer service and response time

Customer Profile

Charles Guilliams, owner of Access Consulting LLC based in Shreveport, LA started his business twenty years ago handling construction remodeling and renovation jobs. While launching his construction business, Guilliams invested considerable time in an accounting education. This helped him marry the two disciplines into a thriving commercial construction and accounting practice that conducts cost-segregation studies for clients building new facilities or undertaking major renovations.

Access Consulting handles everything from project management of commercial and residential facilities to cost-segregation and feasibility studies that help small to large companies take advantage of immediate tax write-offs on disposable assets that can be depreciated within the first few years. Using his unique blend of engineering experience and accounting expertise, Guilliams conducts the cost-segregation studies to help his clients identify short-lived assets and capital expenditures that qualify for 5, 7 and 15-year write-offs, rather than the usual 39 years. The bottom line for Guilliams' clients is improved cash flow up front.

Business Case

It is not hard to imagine the amount of paperwork generated by this type of business. Guilliams' practice involves the handling of everything from aerial photographs to maps to countless accounting program files utilized by his diverse client base. He needed a way to easily store and retrieve client files and vendor files including cost-segregation studies and building plans, as well as invoices and payments.

Before implementing the FileVision document management software with the Matchmaker information manager, he made multiple paper copies of documents and kept them in multiple file folders. For example, one copy in the project file, one copy in the vendor file. To put it in Guilliams' words, "I was papering myself to death and spending countless hours wading through the documentation to successfully bid new jobs and stay on top of ongoing projects."

Solution

Charles Guilliams chose FileVision with Matchmaker to help him retrieve his documents quickly and easily in all their variations. With FileVision loaded on his office computer, Guilliams is equipped with a laptop and accesses FileVision via the internet. FileVision with Matchmaker allows him to find documents using any combination of assigned keywords, defining filters or previous searches. This gives him the flexibility to search for and retrieve previous feasibility and cost-segregation studies as references for bidding new jobs

while he's onsite at prospective client locations. He says he likes the fact that he can get into his document management system from three states away and use a redacted copy of a previous study to show a similar client. He doesn't go in armed with generic promotional materials. First, he seeks to understand the client's business and then he can show them how he has helped a similar business save tax dollars to increase their cash flow. This approach gives his prospects a personal, service oriented touch, unlike a canned sales presentation.

And the best part is that no one is sitting back in the home office waiting for his call to search for and fax him the documents he needs. Guilliams hopes to never have to add administrative staff. Instead, he plans to hire someone he can train to replicate his job and grow the business.



Benefits

The biggest benefit FileVision has brought to Access Consulting is the reduced sales cycle. The time saved traveling between the office filing cabinet and the client location to search for and retrieve paper documentation and file folders saves time, which "is" money in this business. It also cuts down on the number of days it takes a client to make the decision to purchase services.

According to Guilliams, "If I can immediately pull up a recent cost-segregation study on my laptop while I'm on location at a prospect's office, show them how much money we saved a similar client and how the same methodology can be applied to their project, just imagine the impact that has on their purchasing decision. First, they know I understand their business and second they experience the quality of our service and efficiency first hand."



Guilliams also stated that he appreciates not having to change the way he runs his business to realize the benefits of the FileVision document management solution. FileVision is easily configured to any business' existing processes or workflow method.

Stated with the easy southern charm that is Charles Guilliams, "If it isn't broke, why fix it? With FileVision, it's a matter of installing and setting up your filing system the same way you would your paper filing system. Except, in many cases you shred the papers once they are scanned and filed in the system." FileVision handles the indexing, filing and retrieving of electronic files and images such as Word documents, Excel spreadsheets, HTML files and digital photographs as well as scanned paper images.

FileVision provides the tools and functionality that allow Access Consulting to redact (white out) the private or confidential information contained in the cost-segregation studies and proposals he uses to bid new projects.

Training and Implementation

Access Consulting made the decision to implement FileVision without the onsite support of the FileVision support team, a service FileVision offers its clients. But the independent and tech-savvy Guilliams wanted to try it on his own and states that implementation went quite smoothly. Although he did have to call for help a few times, the FileVision team always responded and easily gave him the guidance he needed over the phone.

Future Plans

Like many companies implementing a document management and imaging solution, Guilliams initially chose to take a "from this point forward" strategy. In other words, he started storing all new documents (both paper and electronic) immediately. Now, as he manually searches for and retrieves previous paper files, he scans those into FileVision as part of the company's goal to get the previous two years of documentation into FileVision. The benefits will continue to increase exponentially as this back file conversion comes to fruition.

Guilliams also acknowledges the benefit of FileVision's security features. In the future when he hires personnel, FileVision will allow Guilliams to limit access to confidential and/or sensitive information that he stores in FileVision, giving staff access to only the information they have a need to know.

FileVision Benefits

- Create a virtual file cabinet for every client
- Streamline processes
- Reduce overhead costs through elimination of physical storage space
- Reduce administrative staff
- Search for and retrieve information based on how you think about (or relate to) your information

About FileVision

FileVision is a global software company that develops information relationship management software. Our solution, FileVision, enables organizations to bridge the gap between digital content and paper documents by easily and strategically creating relationships between important, disparate pieces of information. Government, healthcare and financial services organizations worldwide rely on our technology to help them intelligently link and match documents to important data objects such as people, companies, processes and assets, resulting in improved communications, enhanced customer service and immediate access to information and relationships within the data.

FileVision is headquartered in Atlanta, GA with offices in the UK, Australia and New Zealand. For more information, please visit us at www.filevision.com.