

LIVING IN THE CLOUD

How GoFileRoom helps this accounting firm see that the sky's the limit

Hertzbach & Company is a full-service public accounting firm with approximately 160 staff members onsite between their three office locations: two in Maryland (Owings Mills and Rockville) and one in Virginia (Arlington). The firm offers comprehensive services related to assurance, tax, consulting, business litigation, and business evaluations.

Bret Carr, CPA, is a partner at the firm who works in the Arlington office. He is an audit tax partner and a leader in the technology department. Carr has worked closely with Thomson Reuters employees, and is a repeat attendee at Thomson Reuters users' conferences. He has seen firsthand how using GoFileRoom can streamline workflows, make processes more efficient, and transform an office into a pleasant, paperless work environment.

STAYING INFORMED AND PASSIONATE

Carr describes the culture of Hertzbach & Company as very family-oriented. "We really just want people to feel like they can raise a family—they can survive outside of the office and have a life," Carr says, in regards to keeping and retaining good employees. His favorite part of the job is working to implement new technology and watching people succeed with it and enjoy using it. "It means more to me than money," he says, "just to see that people are actually using the new technology and I'm making a difference."

One of the ways Carr stays up to date is by attending Thomson Reuters users' conferences. It's a priority for him to know what the latest, most high-quality and cost-effective products are so he can be informed for his company. One of the things he most enjoys about attending the SYNERGY Conference is networking with Thomson Reuters employees. "I'm on a first name basis with a lot of them," Carr says. "And I really enjoy seeing the products ... if Thomson Reuters is blowing the product that we're using out of the water, I want to know so that I'm not left behind."

THE TRANSFORMATIVE POWER OF GOFILEROOM

Hertzbach & Company use GoFileRoom and Carr has seen tremendous benefits. "I think what differentiated GoFileRoom in the marketplace for me was the cloud," Carr says. "GoFileRoom was really a pioneer in the cloud storage system." The firm also experienced significant savings. Carr says that when the firm only had 20 employees, he saw the paper costs decrease from \$11,000 to \$2,000 annually—he expects those savings to be at the same ratio with the greater number of employees.

Carr finds other efficiencies with GoFileRoom in terms of the overall workflow process—how easy it is to track the status of projects, scan tax files so they won't get lost, share files with clients, and instantaneously fix any errors in the file. He also values the ability to use the control panel function. "It's a little more advanced, but it's powerful and I do not believe that the other software companies have that capability, at least yet," Carr says. "You can name tax returns in a certain way and all you have to do is drag the main folder on it, and then if it's set up correctly, it'll go to all the places it's supposed to without having to index it separately once it's in the system."

GOFILEROOM®



HERTZBACH & COMPANY

Bret Carr, Partner

ABOUT HERTZBACH & COMPANY

Hertzbach & Company is based in Owings Mills, Maryland, with two other offices in Rockville, Maryland and Arlington, Virginia. Services include assurance and accounting, tax, management advisory, business valuation, litigation counseling, forensic and fraud services, and estate planning/wealth management.

WEBSITE

At hertzbach.com, the firm offers blog articles written by staff on topics from affordable housing, to healthcare and real estate. Newsletters on business, accounting, and tax topics are also featured.

SOFTWARE

Hertzbach & Company use GoFileRoom, the advanced document management and workflow software that includes ApplicationFlow™, WorkFlow Manager™, TaxSort®, ScanFlow™, ClientFlow™, and RecordsFlow™.



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In addition to the other benefits, GoFileRoom had a big impact on the office environment. Carr says that Hertzbach & Company built out the Arlington office without storage in mind—because they effectively moved to a paperless office and eliminated offsite storage, the location doesn't have file cabinets, bookshelves, or any other places to store paper. "Our office is spectacular because it's all glass and there's not piles of papers and embarrassing-looking desks everywhere," Carr says. "So our office has actually been inadvertently affected by GoFileRoom and become a lot more modern."

