

# TRACKING PROJECTS WITH GOFILEROOM & FIRMFLOW

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**TaxOps, LLC**, made the decision to implement GoFileRoom, and FirmFlow in January 2009 when tracking projects on a shared network drive and Microsoft Excel® spreadsheets became too much.

*“After one demo, my staff was ready for the change. No, they insisted on the change,”* said Brian Amann, a director at and the founder of TaxOps, LLC. *“They said, ‘We have to have this.’ It was easy because the program is intuitive and the learning curve was short. We went through the web implementation and worked with a consultant online. Thomson Reuters was great and our consultant spent a lot of time with us to make sure our structure was right up front. We were up and running very quickly.”*

When it comes to document storage, TaxOps understands the importance of a uniform folder structure. *“When we were using a shared network to store documents, it was nearly impossible to enforce a uniform folder structure across the firm,”* said Brian. Tracking projects and searching for documents were also areas they needed to improve in order to increase efficiency. For these reasons, the FirmFlow module caught the attention of Brian and staff at TaxOps.

FirmFlow standardizes any business process through automated routing functionality, real-time tracking, and custom reporting features. The completely digital process lets TaxOps staff monitor activity from start to finish, experience lower operating costs, improve efficiency, and enhance client service.

As a tax-only practice focused on business clients, TaxOps does very few 1040s and is completely paperless. *“We receive almost everything electronically and import those files into GoFileRoom. Our next step is the portal,”* said Brian. *“The fact that we were able to customize the workflow steps within GoFileRoom to fit our firm’s existing procedures was also important in our decision.”* The workflow for a typical business return includes the involvement of a minimum of three to five people and the following steps:

- The pre-planning phase
- The information-gathering phase
- Detailed project planning
- Issue identification and resolution
- Assigning tasks to various staff members
- Preparation
- Manager review
- Partner review

*“It’s nice to be able to manage our workflow, access everything in one place, and pull reports to see who has a project, where it has been and how long it has been there,”* said Brian. The innovative search and digital retrieval features of GoFileRoom let firms, like TaxOps, quickly find any document using search/index fields and keywords, or by selecting their own saved searches.

## GOFILEROOM



**TAXOPS, LLC**

Brian Amann  
Director and Founder



# GOFILEROOM

With employees that work from home 80% of the time, the easily accessible interface of GoFileRoom as a web-hosted solution is a plus for TaxOps. The flexibility of 24/7 web-based access and a logical file structure enables staff to find any file within seconds.

Brian Amann had this advice for small firms thinking about a document management system, *“(1) If you are going paperless, you need something to manage your paperless workflow, in addition to standard document management. Going paperless can be disastrous without a system like GoFileRoom. (2) Dual monitors are a must—even better if you have three. The staff members at TaxOps all have dual monitors and I personally use three monitors. It’s a necessity to compare information side-by-side. And, (3) firms with multiple offices or remote workers cannot do without a document management system in place.”* GoFileRoom standardizes and organizes volumes of documents and offers the flexibility of 24/7 web-based access, so staff can share, route, and review files whenever needed.

Firms of all sizes can easily manage their paperless workflow with GoFileRoom. It is a scalable solution that combines comprehensive document management, scanning, and workflow technologies with the power of the Internet to provide firms with a single tool to efficiently manage, secure, and streamline the workflow process.

## ABOUT TAXOPS, LLC

TaxOps is located in Lakewood, Colorado. The firm was founded by Brian Amann and—with a team of directors—provides tax solutions to dynamic companies to assist them with all aspects of their tax operations. The collective “Big 4” experience of their partners and staff, combined with industry specialization, allows them to provide both top-notch tax technical expertise and a high level of personal attention and service. To find out more, visit [www.taxops.com](http://www.taxops.com).

