

READY, STEADY, GO!

When you have seven offices to manage and integrate, you want to make your work as efficient and productive as possible.

That's exactly why **Williams & Company, PC**, implemented GoFileRoom late last year. Headquartered in Sioux City, Iowa, the firm already uses the CS Professional Suite from Thomson Reuters. So adding GoFileRoom was a logical next step.

"The primary objective is something we've been wanting to move closer to for a long time," says Michael Miranda, the firm's senior manager. *"We wanted a vehicle to integrate all our offices, to make it easier for them to work with each other. With Virtual Office CS and GoFileRoom, I think we accomplished that."*

It's not just the ease of scanning, storing, and sharing documents electronically, although those are among the key benefits of GoFileRoom. Williams & Company has found ways to use GoFileRoom to address some of its specific needs.

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CHECKLISTS

According to Miranda, the tax side of the firm used to struggle with checklists. By integrating checklists into the GoFileRoom workflow, the firm enhanced its return processing and quality control.

TRUST ADMINISTRATION

The firm has improved its compliance on life insurance trusts for which it functions as administrative trustee. *"For example, where there's no tax return actually filed we've put premium statement notices into the workflow system,"* says Miranda. *"That will trigger a recurring reminder so we never miss a deadline."*

RETIREMENT PLAN CONSULTING

Miranda sees the potential for using GoFileRoom as a document management and deliverable tracking system for retirement plan consulting.

ONLINE LIBRARY

Williams & Company has put all its library materials, webinars, and training session recordings online using GoFileRoom. *"Employees can access these materials at their convenience or even from their home,"* says Miranda, *"and the search capability has come in very handy, too."*

Miranda adds that he's spoken with other firms who are also using GoFileRoom. *"Even for firms that have very different systems and processes than we do,"* says Miranda, *"I can see the application of this product to multiple uses."*

GoFileRoom product account manager, Josh Judit: *"GoFileRoom is an ideal fit for Williams & Company. The fact that it's completely web-based means they can better serve their clients by easily sharing work across all their offices, and instantly accessing client documents and engagement information on a real-time basis. These capabilities and others allow Williams & Company to recognize a significant return on investment with GoFileRoom."*

GOFILEROOM



WILLIAMS & COMPANY, PC

Michael Miranda
Senior Manager

