

How SmartVault's Partnership Increased Customer Retention For My Business

Pescatore Cooper, PLC

When SmartVault launches a new feature, Katie Lohman, CPA with the firm Pescatore Cooper PLC, is quick to test it. In fact, a big fan of the cloud-based document management system, she praised SmartVault for its commitment to ongoing solution improvements.

“I love the continual enhancements to the solution,” stated Lohman. “I feel like the company’s focus is always on making my work life easier. The system is powerful, and with each new feature it gets better.”

At the core of SmartVault’s mission is to allow professionals to work the way they want to work, and for Lohman, the product delivers just that. The firm has long been on the paperless path—and SmartVault supports the firm’s digital environment. For example, the tax process starts with scanning client source documents; scanned documents flow into SmartVault where they are filed within the appropriate client folder; and then data flows into Lacerte for tax preparation.

“Our processes are efficient and streamlined. That’s how we work,” said Lohman. “The solution is regularly updated with new features, and I have my favorites.”

One of her favorites is Notes. “This feature allows us to add notes to a document without having to rescan it. This saves a lot of time.”

A bigger favorite is the Connected Desktop. Because this feature mimics a local drive, it offers a familiar file structure for staff while still providing the 24/7 accessibility via the cloud.

“Connected Desktop makes filing client documents very logical and easy. Convenience seems to be at the heart of system enhancements. SmartVault has our back.”

The transition from desktop to the cloud...How sweet it is

The firm has been on the SmartVault solution since 2014. Prior to that the firm used Lacerte DMS. When Intuit announced sunset of the DMS, SmartVault was the ideal replacement. Integrated with Lacerte ProSeries, SmartVault fully supports the firm's paperless tax process.

"The DMS worked well for us, but processes improved with SmartVault," said Lohman.

Improvement came in many forms. First, by moving to a cloud-based solution, it eliminated the firm's issue with server space. "The DMS was desktop, so all documents were stored on our internal server. We have volumes of files, so we were always running out of space."

Lohman also reported spikes in efficiency with the transition to SmartVault. For example, the ability to send clients a secure link to access documents simplified the delivery process. "We used to email documents to clients, and that meant having to password protect every PDF. It was time consuming. It's so much faster and efficient now."

The transition from DMS to SmartVault was also easy and pain-free according to Katie Lohman. "I remember the transition being pretty smooth. Migrating the data was simple because we had the support of a dedicated SmartVault rep. They were so helpful."

Added time savings came from the ease of working remotely. "I've personally experienced efficiency gains in working from home using SmartVault. Before I would have to 'dial' into my computer to connect to the firm, now I can just access files directly from a browser."

There has also been a noticeable reduction in client requests for documents. Because clients have secure 24/7 access to files from within their portals, calls and emails have drastically been reduced.

"Clients can just log in and grab what they need. This has cut down tremendously on calls into the office and reduced the amount of time staff spend on locating and sending files," said Lohman.

The move from Lacerte DMS to SmartVault has proven successful for the firm of Pescatore Cooper PLC. Improvements in productivity and client service are at the heart of the firm's success.

"We've been able to improve our processes with SmartVault. It's a great product and is always getting better. They really know what accounting professionals need to be successful," said Lohman.



Built with bank-level security, SmartVault offers a cloud-based document management system and client portal designed to help you reduce costs, raise productivity and employee happiness, stay in compliance, and deliver higher levels of service.

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