

RBZ, LLP Makes a Cost-Effective Transition to Paperless Efficiency with Autonomy iManage and Stria

Introduction

RBZ, LLP is a Los Angeles-based public accounting firm that has served businesses and individuals in the areas of tax, audit, and business consulting since 1975.

Organization Background

For RBZ, LLP, industry leadership and technology leadership go hand-in-hand. "As our business grew, we reached the point where our systems were holding us back," says Chris Coart, Practice Technology Manager, RBZ. "It was clear that we needed to be on the leading edge of technology to continue our growth and success." The essence of the problem: paper. Physical client files were cumbersome to track and retrieve, and paper-based work product, files, and research could not easily be searched, shared, and re-used among the firm's work teams.

RBZ needed to implement a state-of-the-art document management (DM) system—one that could also store and manage high volumes of client emails. "Autonomy iManage's WorkSite was the right choice for our firm," says Coart. "The solution is ideally designed and configured to support professional services organizations with a need for accurate, efficient, engagement-oriented information management." To enhance the system's value, RBZ planned to capture its existing paper-based information into the WorkSite repository.

Making a Painless Paperless Transition with Autonomy iManage and Stria

RBZ used WorkSite to create online client files that enable employees to search, access, and share complete information easily. Stria, a document lifecycle services provider, offered an efficient solution for the capture of paper files. "To make sure things are being captured securely and accurately, you need to have high-quality, highly trained people on the job," says Coart. "By outsourcing the whole process to Stria, we can get it done faster, better, and at an incredibly good price." Says Jim Damian, Stria's president and CEO, "There are many firms like RBZ who need to get their paper-based information into WorkSite as quickly and efficiently as possible. We see our services as the ideal complement to maximize the return on a firm's iManage WorkSite investment."

RBZ now manages both finished work product and work in progress in WorkSite. Incoming paper documents are scanned into the system, and the firm is working with Stria on back-file conversion as well. "Everything is secure, trackable, and available," says Coart "WorkSite gives us the power not only to retrieve individual documents, but to search their content, so we can easily find and use any information anywhere in the firm."

Streamlining Information Access while Reducing Costs

"We're expanding rapidly, so being able to cut our onsite storage in half and use that space for revenue-generating work is a huge benefit. We'll also be able to eliminate offsite storage, which is a major cost as well," says Coart. Beyond storage costs, the firm projects additional annual savings of \$200,000 for information tracking and retrieval. "There's a time cost to pulling paper files onsite; for offsite storage, you also have delivery charges, and it takes a day or two to get the information. With WorkSite and Stria, we can have all that data in-house, and can pull anything we need—out of almost 500,000 records to date—in seconds."



Highlights

Industry

Accounting

Challenges

- Paper files, work product, and research could not be searched, shared, or re-used effectively
- Costs to file, manage, find, and retrieve both paper and electronic files were significant
- An outdated information management infrastructure failed to support the firm's business growth
- Directing internal resources to scan paper records distracted the firm from its core mission

Benefits of Using iManage and Autonomy iManage and Stria

- RBZ projects annual savings of \$200,000 for paper filing and retrieval alone, in addition to reduced offsite storage costs and reclaimed onsite office space
- Online client files managed in WorkSite increase efficiency, improve responsiveness, and reduce risk
- The benefits associated with WorkSite increased dramatically when the Stria team imaged and indexed files into the repository at 400 pages per minute

About Stria

Stria is a nationwide provider of Document Lifecycle Services. Stria provides the staff, scanners, systems, managers and ancillary services needed to convert physical records (paper, microform, X-Rays, etc.) into digital documents that port into WorkSite or any other document management system. The company has a deep focus on conventional imaging services, Scan-on-Demand record management and onsite scanning services.

To learn more visit www.Stria.com.



Stria.com 877.839.8952



Increasing Efficiency through Online Filing and Content Re-Use

RBZ took advantage of WorkSite's flexibility to manage its content by engagement rather than client, Coart explains. "Things are organized in the context of specific tasks, such as an individual tax return, so people can spotlight what they need and work more quickly." The firm's professionals also use WorkSite to gather information on similar past engagements and efficiently re-use content. "By basing a contract or form on existing work product, we can create a new document in 30 minutes rather than three hours, pass those savings on to the client, then spend that time bringing in new clients." Back-office workspaces enable internal RBZ departments such as human resources and global client service teams to collaborate, share resources, and communicate at a similarly high level of efficiency.

Reducing Risk

Easy-to-use DM, email management, and records management functionality helps RBZ reduce risk. Seamless integration between WorkSite and Outlook makes it simple to manage all related client and engagement content including documents, scanned files, and email in a single place; emails can be dragged from the in-box directly into online client files. "We don't want to retain all emails; we need to protect our clients' privacy," Coart explains. "We tell people that, if there's something they want to keep, they should move it to WorkSite, where it gets tagged and retained; everything else is flushed on a regular basis." Emails and other files can also be declared records with a few keystrokes and preserved securely in unchanged form.

Moving Forward on a Scalable Platform for Growth

"The paperless infrastructure that Autonomy iManage and Stria have delivered has become the key to our future," says Coart. "Without it, our costs would increase dramatically, efficiency would suffer, and our growth would slow to a crawl. Our client base would be smaller, and we wouldn't be able to fulfill our goal of giving them the best service possible. Instead, we're fulfilling our objective to be an industry leader in both technology and quality, and we're seeing the benefits on our bottom line."

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Chris Coart, RBZ, Practice Technology Manager

About Autonomy

Autonomy Corporation plc (LSE: AU. or AU.L), a global leader in infrastructure software for the enterprise, spearheads the Meaning Based Computing movement. IDC recently recognized Autonomy as having the largest market share and fastest growth in the worldwide search and discovery market. Autonomy's technology allows computers to harness the full richness of human information, forming a conceptual and contextual understanding of any piece of electronic data, including unstructured information, such as text, email, web pages, voice, or video. Autonomy's software powers the full spectrum of mission-critical enterprise applications including pan-enterprise search, customer interaction solutions, information governance, end-to-end eDiscovery, records management, archiving, business process management, web content management, web optimization, rich media management and video and audio analysis.

Autonomy's customer base is comprised of more than 20,000 global companies, law firms and federal agencies including: AOL, BAE Systems, BBC, Bloomberg, Boeing, Citigroup, Coca Cola, Daimler AG, Deutsche Bank, DLA Piper, Ericsson, FedEx, Ford, GlaxoSmithKline, Lloyds Banking Group, NASA, Nestlé, the New York Stock Exchange, Reuters, Shell, Tesco, T-Mobile, the U.S. Department of Energy, the U.S. Department of Homeland Security and the U.S. Securities and Exchange Commission. More than 400 companies OEM Autonomy technology, including Symantec, Citrix, HP, Novell, Oracle, Sybase and TIBCO. The company has offices worldwide.

Please visit www.autonomy.com to find out more.

Solution Overview

Going Paperless with Autonomy iManage and Stria

Autonomy iManage's Worksite powers electronic client files for RBZ, enabling professionals throughout the firm to search, access, and share research, client files, and work product. Integration with Microsoft Word and Adobe Acrobat enhances efficiency and ease of use. Back-office workspaces provide secure access to human resources documents and support global teams dedicated to client service. Stria document lifecycle services enhance the value of RBZ's WorkSite implementation by providing fast, accurate, cost-effective scanning of current and legacy paper files, improving responsiveness and efficiency by making vast amounts of information instantly available.

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