



Kirshon & Company, P.C.

Accounting and
Financial Services**AT A GLANCE:****>> Company:**

Kirshon & Company, P.C.

>> Location:

Poughkeepsie, New York

>> Industry:

Accounting & Financial Services

>> Business Challenge:

The firm needed a robust electronic document management solution able to handle filing, storage and retrieval tasks for any windows application

>> Solution:

CNG-SAFE document management platform and CNG's integration tools such as Retriever, Synchronizer and CNG-API synchronize customer records, link documents with existing data, and integrate processes and workflow

>> Results:

Better business processes and streamlined workflows thanks to CNG-SAFE. Plus, a new business opportunity of introducing clients to the benefits of using CNG-SAFE in their operations.

Kirshon & Co. Deploys CNG-SAFE As Its Firm-wide Document Management Platform

CNG Unites, Secures and Processes Information from Multiple Sources .

Kirshon & Company, P.C, is a leading CPA firm based in Poughkeepsie, NY. With the upcoming tax season looming, Kirshon needed a robust, full featured and easy-to-use electronic document management solution in place, pronto. No stranger to paperless -- Tammy Acard, Principal at Kirshon & Co., is "passionate" about the subject -- the company had tried and rejected multiple electronic document management systems. All lacked the ability to manage and work with all types of documents and business applications, as well as the ability to work with all types of employees: Kirshon wanted an easy-to-use system that would not require IT expertise in-house.

Integrating Different Documents, Software and Applications is a Challenge

Today's CPA firms need electronic document management to efficiently

manage expense reports, tax documents, invoices, purchase orders, balance sheets, income statements, standard forms, contracts, phone messages, email communications and more. CPAs also need support for regulatory compliance, security and integration with third party applications such as QuickBooks, CCH's TAX, PRACTICE, etc. and others.

"We experienced numerous timeouts and failures with competing document management systems. One failure required two weeks downtime before the necessary updates were available. That cost too much money and too much time."

Tammy Acard,

Kirshon & Company, P.C., Principal

Kirshon was committed to paperless processes but found the document management modules of specialized accounting/Tax software applications in use at the

company lacking in a number of ways. Tammy says, "We experienced **numerous** timeouts and failures with competing document management systems. One failure required two weeks downtime before the necessary updates were available. That cost too much money and too much time."

After examining multiple electronic document management solutions, Kirshon

chose CNG-SAFE, Cabinet NG's Shared Access Filing Environment, because it integrates – without the need for custom IT engineering – with most Windows-based CRM, accounting/tax and other software and programs most CPA firms use to run their businesses.

Ability to Integrate With All Accounting and Related Applications

Kirshon continues to use specialized tax and accounting software for client contact management, record-keeping, and other key tasks while using CNG-SAFE's central electronic document storage repository to seamlessly manage all their documents.

CNG-SAFE's tight integration with CNG-BOOKS allows the processing of Quick-Books transactions in one timesaving step. Cabinet NG's superior customer service helped Kirshon migrate 14,000 documents into CNG-SAFE in time for the peak of tax season.

Flexibility and control are important to Kirshon. The ability to design tabs, cabinets and files according to how the firm operates is part of CNG's commitment to ease-of-use: CNG-SAFE easily adapts to a company's operations, not the other way around. Complete rights management, rules-based document retention and built-in audit capabilities also enable the small enterprise to control access to sensitive documents and client data. Tammy noted that the ability to design workflow and automation processes according to Kirshon's needs gave her employees a degree of autonomy that contributed to productivity at the firm.

Show Me The ROI: Technology Needs to Prove Itself Today

IT research firms Gartner Group and Forrester Research have issued reports lowering growth expectations for IT spending in 2009. Businesses are selectively funding technology projects in current challenging economic times. CNG document management is

attractive in tough business environments because it easily integrates with a firm's existing business applications. Managing firm-wide client and business documents across multiple accounting functions including bookkeeping, tax, valuations and write-ups compounds the total return on investment (ROI). CNG-SAFE clients often report a ROI of less than 6 months based on labor, supplies and storage savings. Value pricing makes CNG-SAFE affordable, and a complete system includes remote installation and training, tech support, maintenance and online training for the first year.

Signing on to CNG-SAFE is good for Kirshon's business. The company uses CNG to manage firm files such as administrative and HR documents as well as to handle all aspects of client CPA and related business. Kirshon has also set up a consultancy, Comprehensive Data Management System (CDMS), to introduce clients and prospects to the benefits of document management. Tammy notes that CPAs are "trusted advisors" able to bring electronic document management to small enterprises lacking the time or IT resources to fully commit to paperless accounting. Introducing CNG-SAFE to others will help them remove the paper bottlenecks to cut costs and streamline processes. In addition, Kirshon gains a way to retain business by integrating closely with their customers as the company expands the range of its services. In challenging economic times, this CPA firm is making all the right moves to ensure Kirshon – and its customers – survive and thrive into the future.

