



Altenburger, Uris, Caglioti & Heyman, LLC

Accounting Firm Sees ROI in Many Facets of Business after Implementing Westbrook Fortis

Organization

Altenburger, Uris, Caglioti & Heyman, LLC is a regional New Jersey-based independent certified public accounting firm offering a broad range of accounting, tax and financial services to the private sector. The firm's large and diverse client base comprised of 1,650 personal clients and 950 business clients triggered a need for greater workplace efficiency and more proficient customer service when managing the thousands of documents produced daily. Staff members needed to access a significant number of documents and files at a moment's notice.

Challenge

"The nature of our business requires one to access critical information in minutes – or even seconds," said Dominic Caglioti, a partner with Altenburger, Uris, Caglioti & Heyman, LLC. "In the past, we spent an overabundance of time and effort accessing, indexing and distributing documents and knew there had to be a more efficient method. The impact of not having a competent document management system extended far beyond day-to-day duties and affected our entire business process."

Solution

The firm was looking for a flexible, scalable and powerful document management system that would change their overall workflow and productivity. The solution was Westbrook **Fortis** software, and the firm worked with Thom Ripple, Sales Manager from AMI Imaging Systems, to implement the product in a timely and cost-effective manner.

"We were pleasantly surprised at how quick and easy the implementation process was," Caglioti continued. "The AMI team was able to customize the software to the way our business functioned and provided ample support and training throughout."

Within weeks, the firm saw dramatic reductions in postage and overtime costs. Caglioti estimated that postage costs were reduced by \$3,000 and

Industry: Accounting

Company: Altenburger, Uris, Caglioti & Heyman, LLC

Location: Marlton, NJ

Number of Employees:
30 professional and support staff

Number of Clients:
Approximately 1,650 personal clients and 950 business clients

Products Used:
Westbrook **Fortis SE**

Westbrook Partner:
AMI Imaging Systems, LLC

Return On Investment:

- Postage costs reduced by \$3,000
- Reduction of overtime costs by \$10,000
- Elimination of off-site storage facility
- Improved workplace efficiency
- Increased client satisfaction with electronic file transfers

personnel overtime costs were cut by \$10,000. The **Fortis** functionality enabled staff to email documents previously sent via mail, and the product's speed gave three staff members an extra five hours per week to dedicate to other projects. These were substantial returns on investment that the firm never even imagined were possible. Caglioti expects cost savings to increase even more in the future.

Another success was the elimination of an off-site storage facility that formerly housed thousands of documents and files. With all of the firm's documents now stored electronically, physical space was back at a maximum. Additionally, staff could replace the tedious process of photocopying, collating, stapling and filing each new document with the ease of compiling electronic files for clients within seconds instead of hours. "Clients' reactions to our increased productivity

have been amazing," Caglioti added. "They are extremely receptive to our new processes and appreciate the ability to easily access their own files when we send them via email or disk. Since we handle more than 2,500 tax returns per year, Westbrook Technologies' document management capabilities have considerably streamlined that process for both our staff and clients."

Caglioti sees Westbrook Technologies' document management software as something that could completely change the accounting industry. "Westbrook Technologies could transform the accounting industry from one of the most inefficient and archaic to the most productive and automated. The impact of such a tool is so far reaching that it affects every segment of our business and has completely reinvented the way we run our company."



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