



TOSHIBA

SUCCESS STORY

Kennedy McLaughlin & Associates

Client: Kennedy McLaughlin & Associates

Country: Australia

Industry: Professional Services

Challenge: To streamline their document management system to save time and money.

Serving Brisbane businesses since 1930

Kennedy McLaughlin & Associates is a Brisbane-based accounting and business advisory firm, helping local business owners to manage their tax, compliance and strategic growth. Located in Spring Hill, in the shadow of Brisbane's iconic Story Bridge, Kennedy McLaughlin has a team of four partners and twelve staff, and has been part of the city's financial landscape since 1930.

Technology for working smarter

Kennedy McLaughlin is proud of its history, but very much a forward-looking organisation, keen to use the power of technology to work smarter. Back in 2015, they realised that there was scope to streamline their document management system—for a business that runs on documents, filing, searching and retrieving are essential functions. Shaving time and effort from the process could translate into significant time and money savings.

The challenges of managing documents

Kay Martin, Accounting and Business Advisor at Kennedy McLaughlin takes up the story: 'We work with a lot of documents—work papers, tax returns, audit statements—which need to be viewed, worked on or signed by different members of our staff. We were using a Microsoft shared drive for storing these, and whilst we did have a procedure and a naming convention for filing, it relied on people following it, which wasn't always the case. That meant that we were spending valuable time searching for documents, rather than on client work—in an industry where we charge for our time, that has a direct impact on the bottom line.'

Kay continues: 'So we needed a good search engine—that was the first thing. But we also had to have a 'digital signature' showing when a document was saved or distributed. In the world of tax and finance, we have documents, such as trust tax returns, which must be filed by the end of the financial year. So we had to have a system that would create an unalterable date stamp.'

The third consideration was workflow—we were printing documents and 'walking' them between the team members who needed to work on them; a process that clearly had no audit trail, a risk of documents getting lost, and no visibility of how long a piece of paper had been sitting in an in tray. 'We knew we needed an automated, electronic workflow', says Kay.

Toshiba—the clear winner for document management

Armed with these requirements, Kennedy McLaughlin approached the market for solutions. They had an existing relationship with Toshiba as the supplier of their printers and scanners and knew that they also offered document management solutions. Of the three companies they considered, Toshiba's proposal was a clear winner. Toshiba took the time to listen to what we wanted', explains Kay, 'and presented a solution that answered all our key requirements. They proposed ELO's Document Management System (DMS) ad hoc workflows, and Digital Signature.'

Putting the system to work

With the decision made, implementation was a joint effort—Kennedy McLaughlin designed the schema, naming conventions and codes, then Toshiba set everything up accordingly. Toshiba also provided training and created a comprehensive portfolio of written user documentation.

Saving time, saving money, meeting compliance deadlines

Since then, they haven't looked back and the system is humming along, making life at Kennedy McLaughlin a lot more efficient and effective.

'The difference has been very noticeable and measurable', says Kay. 'The key benefits are: Firstly, we no longer spend time trying to find documents—the search function in the DMS means we can always find what we're looking for quickly. Secondly, the workflow means that we print a great deal less—in fact, we save \$2000 a year, just on paper costs. Thirdly, we can always see exactly where a document is in the process. If any document has been waiting for more than two hours, it gets flagged to me and I can investigate and escalate. That means we're getting work done faster and meeting all our compliance deadlines.'

It just works

Kay really values the partnership with Toshiba; 'They weren't just there to sell the solution, they provide ongoing support too—they created some additional functionality when we needed it, for example. Apart from that though, because of the work we all did to get things right at the start, to be honest we don't really need much support now. The single best thing about the solution is that I no longer have any stress around document management—the system simply works, and does what we want it to do.'

Toshiba (Australia) Pty Limited
Building C, 12-24 Talavera Road
North Ryde, NSW, 2113
Australia
P: 1300 794 202

New Zealand
32 Lunn Avenue, Mt Wellington
P: 09 570 8530

www.toshiba-business.com.au
www.toshiba-business.co.nz