

J.H. Cohn LLP

Leading accounting firm adopts document service solutions from Adobe Systems and Immediatch for fast, efficient handling of client materials

J.H. COHN LLP

- Largest independent accounting and consulting firm in Northeastern U.S.
- Locations: New Jersey, New York, and California
- Founded: 1919
- www.jhcohn.com



INDUSTRY

Accounting and Consulting

SOLUTION

- Electronic Collaboration
- Electronic Workflow

PRODUCTS USED

Adobe Acrobat Professional

IN PARTNERSHIP WITH

- Immediatch Corporation
- Provider of GoFileRoom, a hosted, Web-based document management system
- Location: Englewood Cliffs, New Jersey
- www.immediatch.com



Company Profile

J.H. Cohn is the largest independent accounting and consulting firm in the Northeastern United States, with more than 90 partners and 600 professionals and support staff. The firm's clients include large, publicly traded companies and mid-sized, closely held proprietorships, partnerships, and corporations.

To improve employee productivity, lower operating costs, and enhance client service, J.H. Cohn uses GoFileRoom®, a hosted Web-based digital document management system from Immediatch. The system provides document capture and indexing for efficient searching, viewing, annotating, e-mailing, and long-term archiving. Because much of the information in GoFileRoom is stored as Adobe® Portable Document Format (PDF) files, J.H. Cohn staff uses Adobe Acrobat® software, a component of the Adobe Intelligent Document Platform, to electronically review and comment on client documents.

Challenges Faced

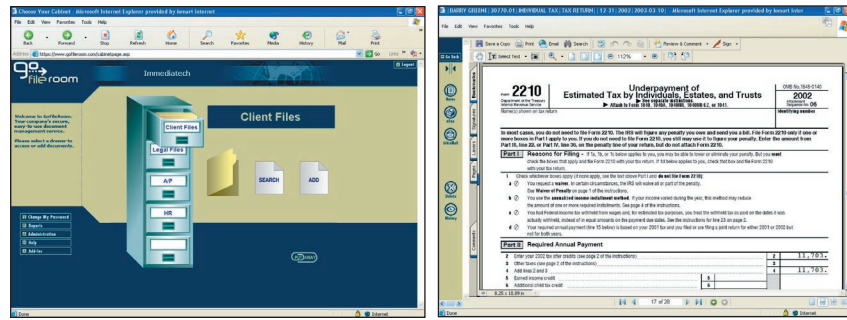
- Streamline information sharing and document workflow
- Boost employee productivity and reduce document management costs
- Enhance client service

Given the scope of the accounting projects handled by J.H. Cohn, it is common for teams of employees to collaborate on work done for corporate and individual clients. Client engagements can involve hundreds of pages, including tax-related files, audit statements, correspondence, and permanent files. Paper-based processes for exchanging and reviewing these materials can be slow and inefficient as employees fax or copy and mail materials. To streamline document preparation, review, and approval, J.H. Cohn wanted to give employees easy, secure access to digital documents in a centralized repository.

Large volumes of paper are often managed during J.H. Cohn client engagements. For example, clients send paper as supporting documentation for tax returns, and these documents are scanned into GoFileRoom, where they are stored as Adobe PDF files. J.H. Cohn staff then generates tax returns in Adobe PDF based on the supplied information. Years of history are stored for each client. To improve operations and reduce operating costs, J.H. Cohn wanted to automate processes so that staff could devote more time to higher value activities.

Working with paper made it difficult to quickly respond to client inquiries because employees had to request that materials be pulled from physical file rooms. Paper-based processes also slowed work on client engagements because employees had to manually distribute documents and wait for input from others. By moving to electronic document processes, J.H. Cohn could streamline staff work on client projects.

The Immediatech service, GoFileRoom, enables more than 600 J.H. Cohn staff to securely review, comment on, track, and archive client files—such as tax returns and financial statements—in Adobe PDF. By combining the tracking features in GoFileRoom with the ability to lock down content in Adobe PDF, the firm can effectively manage vital client files.



“By automating document delivery, collaboration, and archiving with Adobe and Immediatech’s GoFileRoom solutions, we can improve operations and offer clients top-notch service.”

Adam Kupperman,
Director,
Cohn Consulting, a division of J.H. Cohn

Success Strategy

J.H. Cohn contracted with Immediatech for Web-based electronic document management services. The Immediatech service, GoFileRoom, enables more than 600 J.H. Cohn staff to securely review, comment on, track, and archive client files in Adobe PDF. “We’re focused on rapid information processing and delivery of final documents,” says Adam Kupperman, director at Cohn Consulting, a division of J.H. Cohn. “By combining Immediatech services with Adobe solutions, we are automating difficult-to-manage, paper-based document processes.”

Client materials originating on paper are scanned by administrative staff, indexed, and then stored in GoFileRoom as Adobe PDF files. Documents that are created by J.H. Cohn staff, such as tax returns or financial statements, are electronically output as Adobe PDF files and placed into GoFileRoom. Staff can use the markup and commenting tools in Acrobat software to electronically comment on documents in Adobe PDF by highlighting questionable areas or adding digital notes with detailed feedback. All of the materials in GoFileRoom are organized in easy-to-access folders by client and type of engagement.

Results

The benefits of more secure, automated document processes are realized throughout the company. With Immediatech GoFileRoom and Adobe solutions, J.H. Cohn staff can instantly access client documents in Adobe PDF from any computer with an Internet connection. “We’re more responsive to customer needs and can better eliminate unnecessary administrative costs,” says Kupperman.

For instance, clients frequently call J.H. Cohn requesting copies of tax returns from prior years or up-to-date information on the current year’s returns. Instead of having a clerk take the time to search through paper files, J.H. Cohn staff can now access materials online in seconds. Retrieved materials can be e-mailed, faxed, or printed from the system. In addition to streamlined administrative processes, J.H. Cohn can devote fewer resources to copying materials and storing paper documents.

Secure, Web-based document management also provides increased control over documents. By combining the tracking features in GoFileRoom with the ability to lock down content in Adobe PDF, the firm can effectively manage vital client files. “The accounting industry is regulated, so companies need to securely and consistently organize, manage, and archive documents,” explains Joe Harpaz, chief technology officer at Immediatech.

Adds Kupperman, “It comes down to providing the best client service as cost-effectively as possible. By automating document delivery, collaboration, and archiving with Adobe and Immediatech’s GoFileRoom solutions, we can improve operations and offer clients top-notch service.”

RESULTS

- Improved service with faster response to client inquiries
- Reduced operating costs with Web-based document management system
- Provided dispersed staff with centralized access to client files
- Simplified review processes with intuitive, electronic commenting tools

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