

Firm Replaces Complicated Document Management System with One That's Simple for All to Use

Howard, Moore & McDuffie, P.C. (HMM) | Georgia

When Howard, Moore & McDuffie, P.C. (HMM) learned their document management system (DMS) was being replaced by newer software – from the same vendor – they had a decision to make: Should they move to the new DMS their vendor was offering or was it time to switch to another provider?

They chose to move to their vendor's new DMS, as the firm was impressed with its long list of features. "We thought it would be phenomenal," Erin Shelton, the Firm Administrator and Chief Financial Officer, explained. "But it was a mistake."

Too Many Features Created Impractical, Complicated Workflows

"The vendor's new DMS had so many bells and whistles that it took out the simplicity of things like dragging and dropping files," Erin said. Trying to save documents in the right folders was also becoming a lengthy process. "There were just so many steps. Overall, that DMS wasn't as easy as advertised, and it decreased our efficiency."

They also used the vendor's client portal solution. "It was clunky and not user-friendly. It required our clients to go through multiple steps to accomplish small tasks."

HMM provides comprehensive services to individuals, businesses, and not-for-profit organizations. And the firm is always expanding its expertise and service offerings to be aligned with its clients' needs.

It was evident to HMM leadership that they needed to replace the DMS and client portal with ones that would better support their business goals.

Switching to a User-Friendly Document Management System Increased Efficiency

They evaluated multiple solutions before selecting SmartVault, a cloud-based document management system and client portal. "SmartVault is most closely aligned to how we work. We like how simple and intuitive it is for staff and clients," Erin explained.

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“SmartVault’s client portal is so simple that our clients aren’t facing any challenges accessing or sharing documents with us,” Erin said. “They just log into the system, see the shared files and folders, and know to drag and drop to upload documents... It’s a very simple process for clients to follow.”

To implement SmartVault, HMM leveraged SmartVault’s migration services to transfer their data from their old DMS into their SmartVault system. “It was great, and I’ve been really pleased with SmartVault’s support,” Erin claimed.

“SmartVault offers many resources we can use without contacting the support team. When we need personalized support, the response time has been great.”

Increasing Productivity with SmartVault

When asked if she’d recommend SmartVault to other accountants, Erin said: “I’d absolutely recommend SmartVault to any business.”

Erin appreciates how SmartVault streamlines their processes and saves time compared to their previous DMS and client portal solution. “I don’t have to click on 5,000 buttons to upload documents or name files,” she said. “It’s not overwhelming, and it’s not complicated, and that’s what I appreciate about SmartVault.”

Using SmartVault – paired with great support and customer success resources – simplifies HMM’s workflows, helping them do more in less time and offer better services to their clients.

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