

"FileTrail is used by virtually everyone in this office and has demonstrated a financial savings, as well as supported our mission to provide great service to clients."

**Brandon Andries**  
Chief Operating Officer  
Virchow Krause & Company LLP

# Virchow Krause & Company

Enterprise records management solution helps public accounting firm gain control of client records.

## Client Profile

**Headquarters: Madison, WI**

**Industry: Accounting**

The firm of Virchow Krause & Co., LLP, has been serving clients for more than 75 years. Dramatic growth has made the firm the nation's 15th largest public accounting firm, with 13 offices in the Midwest. Part of this growth stems from the passion for service that is part of the culture of the firm. Everyone at Virchow Krause embraces this business philosophy, knowing that satisfied and successful clients are the very heart of the firm's success.

**FileTrail Implementation: 2001**

## FileTrail Products Implemented

- **FileTrail Enterprise** - File tracking and records management automation for multiple-site organizations.
- **FTColorLabel** - On-demand printing of color-coded folder labels.
- **FTMobile™** - Portable platform for file tracking and auditing.
- **FTConnect™** - Scheduled synchronization of client/engagement and user/security data with upstream systems.

**FILETRAIL**  
...because Paper Happens®

<http://www.FileTrail.com>

## Background

Dealing with client files used to consume a lot of time for staff at the firm of Virchow Krause & Company (VK). When the firm tripled in size over a three-year period, partners recognized the need to implement controls and automation.

VK implemented a solution from FileTrail in 2001. As a result, professional staff spend less time on manual tasks and focus on higher-value work and delivering excellent service to the firm's clients. Since implementing FileTrail, the firm has expanded the FileTrail solution to multiple offices.

## Choosing FileTrail

The process of choosing a system was taken very seriously. Internal Services Manager Vicki Bongiovani, had been through a difficult implementation of a file tracking system with a previous employer and did not want to repeat that experience.

Bongiovani began the process of finding and reviewing prospective vendors to present to the firm. FileTrail was selected by the project team after reviewing many vendors. "Being able to run over our Intranet was a very big selling point," Bongiovani said.

"We validated that FileTrail was the product of choice by talking to other firms that used the system," said Brandon Andries, a partner with the firm that led the project team. "Because of the strong recommendations that continued to come through for FileTrail, we determined they were going to be able to more than meet our needs."

## Lost Files Cost Money

One of the firm's goals was to eliminate the costly and time-consuming problem of retrieving files.

"Staff would go door to door, looking through file drawers, and burning billable time," Andries said. "That time is ultimately written off because there is no value to our client in us looking for a file."

FileTrail has made it easy to locate files. Professional staff save time by searching in FileTrail at their desks using the friendly browser interface.

"FileTrail is easy to use because it is like Amazon.com or Macys.com," according to Bongiovani. "Anyone can understand it and use it without reading instructions."

## Application Highlights

- The FileTrail application was rolled out to more than 300 staff instantly without installing software at the desktops
- Color-coded labeling saves labor by simplifying filing and retrieval

## Key Results

- **No More Lost Files:** Files are easily tracked using bar code technology.
- **Less Walking to File Room:** Professional staff save time locating files without leaving their desks.
- **Online Requesting:** Professional staff save time requesting files to be pulled, delivered, copied, or faxed, without leaving their desks.
- **File Room Automation:** Bar coding saves time in pulling, checking-out, checking-in, refiling and archiving files
- **Ad Hoc Reporting:** Professional staff are able to generate on-the-fly reports and download to Excel.

## Customer Insight

We realized significant cost savings, as the number of missing files has dropped to virtually zero. During the 2002 tax season, our first after implementing FileTrail, there were no lost files. That was a new high-water mark for us.

Security is a key element of our business. We have some areas that need to share information. However, some practices, like Wealth Management, are highly confidential. FileTrail's security tools give us the control to protect information, determining who can see and edit which records.

## About FileTrail

FileTrail, Inc., is the leading provider of browser-based records management solutions. Companies of all sizes turn to FileTrail to streamline processes with the latest technology and most configurable software. Headquartered in San Jose, California, FileTrail has been providing solutions for records management since 2001.

**FILETRAIL**<sup>®</sup>  
...because Paper Happens<sup>®</sup>

<http://www.FileTrail.com>

© 2004-2008 FileTrail, Inc. All rights reserved. FileTrail, Paper Happens, Passive Tracking, The files told us., Continuous Automatic Tracking, other FileTrail product names, and the FileTrail and FileTrail RFID logos are either registered trademarks or trademarks of FileTrail, Inc. All other trademarks are property of their respective owners.

## Less Walking Saves Money

The old, manual approach to locating files meant a lot of "walking payroll" or staff walking around looking for the file instead of producing billable work. FileTrail's automated request and fulfillment process came to the rescue. Once staff have done a search at their desks and identified the files they need, they simply click the "Request" button to order the files; FileTrail alerts file room staff to pending requests. The Pull List and Delivery List reports ensure that files are pulled in an efficient way and available quickly.

FileTrail also simplified dealing with active files. When staff see that a file they need is already out, FileTrail can email that person a message or they can simply walk over to their desk to get it. A simple transfer process reassigns the file, keeping the file's location information current and adding to the file's location audit trail.

## More Efficiency From The Start

FileTrail provided increased efficiency by color-coding the files in the new central file room. The use of color coding reduces the time required to retrieve and refile by up to 75%. Much of this savings comes from the reduction of misfiles - color coding makes it more difficult to put a file in the wrong place.

"Our color-coded labels clearly identify the client, department and year," said Bongiovani. "This makes it easy for anyone to recognize that they have the correct file. We haven't done a search for a misfiled file since 2001 because of it."



Sample Color Coded Label

## Integration Saves Labor

Powerful integration tools allow FileTrail to automatically synchronize data with VK's Practice Management system, eliminating administrative tasks.

"Our client lists are automatically synchronized in the background, so that client and project information is up-to-date without any data entry in FileTrail," said Sam Bronchetti, Senior Manager of Technology.

"In addition, all our staff information is synchronized, so that new staff appear automatically in FileTrail with their security already set," Bongiovani added. "This saves me a lot of time as an administrator of the system."

## A Perfect Fit

One of the key benefits of FileTrail is its flexibility. The software contains easy-to-use configuration tools that allow it to adapt to each client's needs. Even in a large organization, each file room or office can operate with separate configurations to fit the types of files and filing media in use.

"Some software is very generic and could be used by any company, while some is very company-specific," said Bongiovani. "What we really liked about FileTrail was that we could customize it without programming to be very specific to our needs."

## Contact FileTrail Today!

For more information about the benefits of automating your firm, contact FileTrail or your local FileTrail representative at:

### FileTrail, Inc.

111 N. Market Street, Suite 715  
San Jose, CA 95113-1108

Telephone: 800-310-0314

Website: [www.filetrail.com](http://www.filetrail.com)