



How has a prominent Florida accounting firm realized the innumerable benefits of a paperless environment — including flawless protection from a devastating hurricane?

O'Sullivan Creel Uses ProSystem fx® Document

In 2002, a merger brought together the strengths of two of the most prominent accounting firms in Northwest Florida to create O'Sullivan Creel, LLP. The alliance resulted in a firm capable of offering more services, more effectively. In order to safeguard information, centralize client information in a digital format, and deliver exceptional client service through standardized procedures, O'Sullivan Creel relies on ProSystem fx® Document (formerly SIAN) from CCH Tax and Accounting.

"It has revolutionized the way we operate our firm. And, I think any one of our partners or team members, including our administrative staff, would tell you they don't know how we did without this for all the years that we did."

Mike Johnson
O'Sullivan Creel



CCH Tax and Accounting
A WoltersKluwer Company

INNOVATIVE SOLUTIONS + UNPRECEDENT

OFFERING POWERFUL SOLUTIONS THAT GO BEYOND THE NUMBERS

Bringing a combined 70 years of experience together with their merger, the two firms that formed O'Sullivan Creel (O'Sullivan Hicks Patton and Creel Bryan and Gallagher) were founded on similar values. Strengthening client performance is inherent to their existence, and the firm takes the unwavering view that they are partners in their clients' future.

In addition to tax and financial planning services, O'Sullivan Creel provides audit and accounting services, small business solutions, business and consulting management, employee benefits consulting and administration, wealth management, and a variety of industry-specific services. A member of the RSM McGladrey Network and part of The Leading Edge Association, the firm also offers the highly regarded "Blueprint for Excellence," a program that helps organizations overcome barriers and achieve success by following a guided process of continuous improvement.

ProSystem *fx*[®] Document's (formerly SIAN) technology and tight integration with core products, especially those from CCH, make it a firm-wide solution for making the most out of all products — both those in the ProSystem *fx*[®] Office Suite and others.

"At O'Sullivan Creel we have always been committed to providing our clients with the best service possible. And so, moving to a digital, paperless environment was a natural progression for us. We reviewed several products that were available to help us reach our goal. We chose SIAN (now ProSystem *fx*[®] Document) because we recognized its technology and integration capabilities were unsurpassed within the industry. We could not have made a better choice."

— Mort O'Sullivan, Managing Partner, O'Sullivan Creel

THE O'SULLIVAN CREEL WORKFLOW USES PROSYSTEM *fx*[®] DOCUMENT AS ITS HUB

To serve the needs of a client roster that extends across many different industries and physical locations, O'Sullivan Creel has three full-service offices in Florida. This makes it essential for staffers to be able to quickly and easily access and share comprehensive client and firm data from multiple locations. In order to help clients achieve their goals and to provide more personalized service, O'Sullivan Creel takes advantage of the unprecedented flexibility and freedom offered by ProSystem *fx*[®] Document — which serves as a centralized hub for all client information and files.

STREAMLINED WORKFLOW — WORKING MORE EFFICIENTLY

Before implementing ProSystem *fx*[®] Document, tax time at O'Sullivan Creel meant an office bogged down with client data in many different forms — paper, faxes, notes — scattered among various folders and desks. And, this client information was only available for review, one person at a time. Today, immediately after entering the firm, every document is scanned into a digital format. Nobody wastes time sorting through paper. Staffers work together more efficiently, data is exactly where it should be, and collaboration between staff, partners, and clients is effortless and rewarding.

By enabling access to any document from any location, ProSystem *fx*[®] Document frees O'Sullivan Creel staff members from dependence on physical pieces of paper, giving them more time to focus on critical client issues. ProSystem *fx*[®] Document's automated retention feature allows implementation of consistent, firm-wide document retention policies resulting in streamlined workflow and reduced storage costs. And because all team members have access to the same information at the same time, the firm has been able to standardize many processes. **They are responding to client needs more efficiently, realizing gains in productivity, reducing the number of hours per return, and experiencing greater profitability.**

"When looking at effective bill rate and the number of hours — we are having a reduction in hours and a growth in revenue. So, over time we are beginning to see how Document contributes to overall efficiencies."

— Mike Johnson, O'Sullivan Creel

INFORMATION AT THEIR FINGERTIPS — BETTER CLIENT SERVICE

In traditional paper environments, finding client data requires physical searching — digging in file cabinets or hunting through rows and rows of hanging files. In other words, clients often have to wait to get the answers they need. However, when a client calls O'Sullivan Creel, the partner simply logs into ProSystem *fx*[®] Document, finds the information they need and provides the client with an immediate response — typically before the phone call ends.

Furthermore, while working at client sites, O'Sullivan Creel staffers are able to focus more time on client interaction and meetings with senior management instead of sorting through papers and chasing down data.

"If we hadn't done this, we would be struggling to service our clients today with the volume that we're asked to respond to and the needs of our clients. Now, the fact that they can get information instantaneously from us has allowed us to better compete."

— Mike Johnson, O'Sullivan Creel

ED INTEGRATION = PEAK PERFORMANCE

DISASTER RECOVERY — PROTECTION FROM UNFORESEEN CATASTROPHES

When Hurricane Ivan swept through the area in 2004, O'Sullivan Creel, like many other businesses, experienced severe damage to their facility — a year later, physical repairs are still in progress. However, unlike other companies which lost data and suffered complete shutdowns, O'Sullivan Creel was up and running just a few days after the storm. How? Their firm's documents were completely intact, safe inside their ProSystem *fx*[®] Document software. While other companies were literally chasing paper down the street, O'Sullivan Creel was back to work after minimal downtime — not one record lost.

"As the power was restored, we were able to just turn our systems on. All our documents were there, it didn't matter your location."

— **Mike Johnson, O'Sullivan Creel**

BETTER TECHNOLOGY — BETTER RETENTION AND RECRUITMENT

Finally, from a recruiting and retention perspective, O'Sullivan Creel understands that their technological advancement is often a critical factor for keeping employees and capturing potential hires. Oftentimes, when an applicant has narrowed his or her choices down to two firms, the firm with significantly better technology — O'Sullivan Creel — comes out a winner.

And, when you can provide a better quality of life for your employees, staff turnover is reduced because you are able to provide more options, including flex-time schedules and remote working access.

"In the quest today, all of us in the profession are faced with finding and retaining quality professionals or team members. With the paperless environment, all of a sudden they are more productive; less frustrated with being able to find information, they can serve the client better. They're happier and they're able to go home at a decent hour most of the time."

— **Mike Johnson, O'Sullivan Creel**



THE RESULTS: INCREASED REVENUES AND EXCEPTIONAL WORK ENVIRONMENT

O'Sullivan Creel has always been recognized as having a great work environment that allows the team to maintain a good quality of life. However, since the firm's adoption of ProSystem *fx*[®] Document, that has changed — for the better. Staff throughout the firm — professionals and administrators alike — are enjoying increased levels of productivity and efficiency. Because all information can be accessed electronically, workloads can be shifted and balanced among appropriate team members, keeping morale and energy levels high. The entire firm operates in a more integrated fashion, work gets done faster, and everyone benefits from the superior work environment.

"One of the key points we see emerging from this is that we were a successful firm with a very good work culture and we were able to increase our productivity and quality of life, which makes everything work a lot better."

— **Mike Johnson, O'Sullivan Creel**

IMPROVED SPECIALIZATION CAPABILITIES

The firm is also taking advantage of its standardized processes, faster response times, and quicker decision-making capabilities in order to identify new business niches and build incremental revenue streams. For example, with ProSystem *fx*[®] Document, the benefits specialist may be in another physical location, but his or her expertise is always accessible. As a result, O'Sullivan Creel can leverage the expertise of every staff member wherever he or she happens to be.

"Our ability to develop niches and drive our expertise in areas of specialization is much better because even if a specialist within a certain category isn't in my office, the information is still right in front of them and they can respond with feedback immediately."

— **Mike Johnson, O'Sullivan Creel**

By using ProSystem *fx*[®] Document, O'Sullivan Creel has successfully implemented a paperless environment, saving time and shelf space while reducing toner, cartridge, and paper expenses. Everyone has become much more efficient and the firm is realizing improved revenue per person.

HOW O'SULLIVAN CREEL, LLP VIEWS THE FUTURE

Adopting advanced technology, like ProSystem *fx*[®] Document, has revolutionized the way the firm does business. As they continue to grow and face new challenges, O'Sullivan Creel is confident that their paperless environment will continue to streamline processes, lower costs, and improve efficiency throughout the firm. As a result, they will be able to stay focused on providing exceptional client service and expanding their areas of expertise while also reducing costs and improving profitability.

BEST PRACTICES FOR THE BEST IMPLEMENTATION

O'Sullivan Creel understood that making the switch to a paperless office environment was going to involve what could amount to a long and complicated implementation process. In order to avoid this situation, O'Sullivan Creel took two very important steps. First, they gained the commitment and support of the entire management team to move to a digital environment. Second, to expedite and create efficiencies, they made a point to look at industry peers to find established best practices for implementation. O'Sullivan Creel took the time to learn from other paperless firms why they had chosen the solution they had and what processes and procedures they had put in place to be successful. Of course, because they were considered early adopters of the technology, O'Sullivan Creel did have to create some of the processes themselves. But overall, through the use of established best practices at the very beginning, and now through the years with help from CCH Tax & Accounting, they have refined these processes and procedures to best practices of their own.

"When we first made the decision to become a digital firm, we determined this product was the best solution out there — the only one for accounting firms really, we didn't want just an off-the-shelf product — that could provide us with an implementation program based on best practices learned by others at that point. And now, by talking with other firms and especially CCH over these years, we have been able to put together what we think are pretty good, pretty refined practices."

— Mike Johnson, O'Sullivan Creel

When you work with CCH Tax & Accounting, you can count on a variety of exceptional support options, including:

A Team of Experts — professionally trained in all areas of tax and accounting, just a toll-free call away.

Regional Support Team — ensures your smooth transition to ProSystem *fx*[®], and assists with any training needs.

Effective Training Options — from in-office sessions to community seminars to Web conferencing.

Tax.CCHGroup.com — instant online access to product and training information, support and program updates.

For more information about The ProSystem *fx*[®] Office suite of software and workflow tools, call us at 1-800-PFX-9998 or visit us at Tax.CCHGroup.com.



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