

## NSA's new information platform boosts efficiency and flexibility




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### Overview

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#### ■ The Challenge

Auckland-based tax specialist NSA Limited needed a way to improve the management and storage of client related documents and email communications. A key requirement was the need to easily and quickly retrieve correspondence and relevant files. NSA's goal was a flexible system that could be easily upgraded to new versions of IBM Lotus Notes®/Domino® and meet changing business needs.

#### ■ The Solution

NSA implemented an information lifecycle management system from Premier IBM® Business Partner\*, Convergence Limited. The new system, which is powered by IBM Lotus Notes and AbilitySuite® for Information Lifecycle Management, provided a flexible content management solution that acted as a central repository of client contact details, emails and documents.

#### ■ The Benefits

The new system based on AbilitySuite® makes it easy to track email and documents. Staff can easily associate important documents and email correspondence with clients, case numbers and even precedents. Staff with the necessary security privileges to the information can retrieve and view threads of correspondence and relevant documents instantly via the integrated AbilitySuite® Central Search Portal. The new system offers a software environment that can be updated to meet the firm's changing needs.

#### About NSA Limited

NSA Limited, based in Auckland, provides advice on New Zealand and international tax law for accountants. As well as assisting with filing tax returns for private businesses, its 22 specialists and staff author proprietary reports and host special events such as tax information seminars for clients.

#### Previous System

NSA is a highly specialised accounting firm that advises other accounting firms on complex tax law questions. Its staff needed seamless access to email correspondence with clients and relevant documents through a reliable information and communication platform.

Under the previous system, documents and email were saved in hierarchical folders under customer names. While files were retrieved through full-text searches, that method could miss important documents and correspondence if the search terms didn't actually appear in the body of text.

*“Our previous system was starting to break down. Managing and finding documents was a nightmare.”*

*Kay Conafray, Personal Assistant and Project Manager for the new document management system at NSA.*

NSA's previous software was inflexible and difficult to upgrade, particularly as it had been heavily customised. That made it hard for the firm to move the previous system to new versions of IBM Lotus Notes, which prevented NSA from exploring on new business opportunities using online video conferencing and collaboration.

#### **Efficient and effective information flow**

NSA worked with Premier IBM Business Partner\* Convergence to implement an information lifecycle management system powered by IBM Lotus Notes/Domino and AbilitySuite® for Information Lifecycle Management. IBM Lotus® software enables efficient and effective information flow and provides an application server platform, which can support non-IBM Lotus software solutions. Based 100% on IBM Lotus technology, the AbilitySuite® for Information Lifecycle Management provides vertical solution modules, which address specific business requirements. The five AbilitySuite® solutions are for:

- *Email Content Management & Archiving*
- *Document Management & Workflow*
- *Customer Relationship Management*
- *Project Management Office, and*
- *Enterprise Identity Management*

NSA have licensed the first three modules to meet their business requirements.

"NSA is providing new and additional complex services" said Mark Presnell, Chief Executive of Convergence. "They need a package that can capture all client information and make it available securely to the right people at the right time."

*"IBM Lotus Notes/Domino and AbilitySuite® have improved the productivity of our people and made it easier for them to share documents and emails. It was the most cost-effective option for us and gives us plenty of room to grow."*

*Kay Conafray, Personal Assistant and Project Manager for the new document management system at NSA.*

Convergence equipped NSA with its information lifecycle management software called AbilitySuite®, which is runs on IBM Lotus Notes/Domino. The implementation process lasted approximately six months as Convergence worked closely with NSA to ensure that the system reflected the desired lifecycle and workflow of documents in the organisation.

The software includes a centralised contact database to register client, contractor and supplier names as well as other relevant details. The system proactively encourages users to tag emails and documents with metadata such as the client's name or subject matter. This is achieved by presenting the user with relevant dialogues at selected times during the process of sending or saving documents and emails. By ensuring that important documents and emails are categorised appropriately it becomes significantly easier for users to subsequently track and retrieve emails and documents they have permission to access by context. This is giving NSA staff the power of the combined knowledge of the organisation 'at the drop of a hat'.

### **Better service for clients**

The result is an information lifecycle management system that helps NSA offer better service to its clients. Staff can be briefed quickly on a client's history and can offer better advice faster. Documents and emails can be quickly and easily retrieved in context as they relate to a client or subject matter. It is even possible for hand-written phone notes captured on tablet computers to be included.

The system assists the preparation of regular documents such as annual returns, precedents and sample cases, which specialists refer to when they advise clients. It also facilitates the sending of regular emails and faxes to keep clients up to date. While there were some challenges associated with migrating documents from the previous document management system to AbilitySuite<sup>®</sup>, these were soon ironed out through close consultation between NSA and Convergence.

"Staff are more efficient and better organised," said Conafray. "They spend less time looking for files or reworking missing ones and more time on productive work."

### **Future plans**

NSA is looking into the online collaborative capabilities provided by IBM Lotus Notes' Sametime<sup>®</sup> software.

The software would make it possible, for example, to broadcast NSA's seminars over the internet to other accounting firms. The firm is also considering opening up its document management capabilities by letting clients securely access their own documents such as their previous tax returns.

"Convergence and IBM have helped us improve the way we access and share information" said Conafray.

"The winners are our staff and clients."

*"The software lets users instantly access documents and correspondence pertaining to the client depending on the user's security clearance" said Presnell.*

**For more information**

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