



How does Rodman & Rodman, P.C. save ~2,500 hours per year using CCH® KnowledgeConnect to manage and access key information?

Whether a firm has been in business for one year or 50 years, the pace and mobile nature of today's accounting industry necessitates a powerful knowledge management system. The longer a firm's history, the more knowledge exists within the heads, files and hard drives of partners and staff. If and when key people leave the organization, their valuable industry, firm and client knowledge can walk out the door with them.

That's one reason accounting firm Rodman & Rodman, P.C. made a priority of acquiring a firm-wide knowledge management system. Founded in 1961 and in business for over 50 years, Rodman & Rodman is an 18-person firm with offices in Braintree and Newton, Massachusetts. The firm already used ProSystem fx® Document, Engagement, Tax, Practice Management and Scan, and recognized that it could benefit by securing their 50 years of knowledge in a centralized, easily accessible location. They turned to CCH® KnowledgeConnect, the industry's leading knowledge management solution designed specifically for accounting firms.

Changing Workflows Require Robust Knowledge Management

CCH KnowledgeConnect provides a reliable means for staff members to manage and find key information. In addition, KnowledgeConnect is integrated with Microsoft® Office and other CCH solutions, making it extremely easy to use.



“Our need for a robust knowledge management system grew over time,” explained Kathy Parker, Rodman & Rodman's IT partner responsible for accounting systems and software. “After we went paperless with ProSystem fx Document in 2005, we wanted to upgrade our internal knowledge management process, which relied on pockets of information spread across the firm in various individuals, databases and files. We needed a better way to store our firm's extensive knowledge and make it easily accessible to our people.”

The firm set out to centralize and store its client and tax research, software tips and tricks and best practices. The fact that partners and staff often secure new business and complete work in the field intensified their need for a knowledge management system that was accessible from anywhere.

“Technology has enabled our people to spend more time in the field or work from home, but it's also changed the way we exchange information,” explained Parker. “In the past, you could go to someone's office and get an answer, but with more people meeting with clients or working off-site, we realized that not being able to find the right person with the answer you needed could leave you at a standstill and waste valuable time.”

Rodman & Rodman, P.C. Key Data

- Founded in 1961
- Offices in Braintree and Newton, Massachusetts
- 4 partners and 15 staff
- Staff members save approximately 3 hours per week with KnowledgeConnect

Making Information Easy to Find

The firm was particularly impressed with how KnowledgeConnect made it easy to manage, navigate and access information from anywhere. KnowledgeConnect gives users the ability to search by keyword across a variety of document types, rate the quality of the knowledge provided and manage the information included. It's particularly useful in standardizing firm-wide best practices and procedures unique to an organization.

“Before we implemented KnowledgeConnect, I would get many more requests about where information was located because different types of knowledge were located in different places,” explained Parker. “Now, people know to check KnowledgeConnect first. The faster we can get important knowledge to our people, the faster they can get their work done.”

Parker recently experienced the benefits of KnowledgeConnect first-hand when she was the first person to arrive at the firm's Braintree office early one morning and was searching for the login information for the high-speed wireless network. Rather than track down the office manager for the password, she was able to get on KnowledgeConnect, find the necessary login information and get working within minutes.

“The number one benefit for us is how quickly KnowledgeConnect places information at our fingertips, whether you've been at the firm for one month or 20 years,” she said. “I was on a client call recently when a client asked a question that I knew we had answered on KnowledgeConnect. Before KnowledgeConnect, finding the answer would have taken 15-30 minutes of research, but we found the answer within 30 seconds on KnowledgeConnect and were able to get the answer to the client right away.”

Saving Valuable Time

Parker estimates that using KnowledgeConnect saves each staff member approximately 3 hours per week by not having to track down people and search for information across the firm. Given that everyone in the firm uses KnowledgeConnect, she estimates that Rodman & Rodman will save approximately 2,500 hours per year — time that can be used serving clients.

“CCH KnowledgeConnect is already a trusted source of firm knowledge,” said, Parker. “We have great content in there now, but as we continue to add essential information, it will inevitably become one of the firm's most valuable software solutions.”

Using KnowledgeConnect, Rodman & Rodman was able to:

- Save approximately 2,500 hours per year in searching for information
- Capture, centralize and secure the firm's knowledge base
- Make 50+ years of firm knowledge accessible to all staff members
- Standardize procedures to create Best Practices