

William Buck is a leading multi-disciplined firm delivering a complete range of professional services, with over 540 professionals and over 70 directors in offices in Victoria, New South Wales, Queensland, South Australia, Western Australia and New Zealand.

William Buck's focus on delivering strategic advice, innovative solutions and service excellence to its clients and its people has underpinned the significant growth of the firm over the last 110 years.

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George Khalil
IT Manager
William Buck

Problem

The IT department at William Buck in an effort to support the business vision of innovative solutions and customer excellence set itself a formidable task—eliminate all roadblocks to workplace efficiency and workflow. It would move to a "less paper" office, streamline business processes, make information more accessible and reduce costs.

Solution

William Buck deployed Interwoven WorkSite as its document management system for archiving and storing business information and knowledge. "We needed a method of creating and collating documents for storing into WorkSite," recalls George Khalil, IT Manager at William Buck.

"We looked at DocsCorp's pdfDocs Desktop software, which checked all the boxes; industry-standard PDFs, document collation, annotation tools for marking up documents and redaction. But it was the unique integration into WorkSite that really won us over and the fact that it was a cost-effective enterprise-wide solution," says Khalil.

"We immediately began to see a tighter, more efficient workflow. Scanned workpapers now sent directly to the user's desktop, could be combined with an ATO Notice of Assessment document and a signed cover letter quickly and easily. The final document, a single, secure PDF could then be profiled into WorkSite directly from the pdfDocs Organiser workspace."

William Buck also saw a dramatic improvement in its client response time. What used to take two days, now took one hour. Using pdfDocs Desktop, client refund documents were processed, combined, saved into WorkSite and emailed directly to the client. Time and cost associated with posting the refunds were significantly reduced. The result was a win-win for everyone—clients got their refunds faster than previously, and William Buck saved money while making clients happy.

"pdfDocs Desktop has delivered more than the company had ever anticipated. pdfDocs Desktop is now a line of business application, it completes our workflow—it is the final piece in the puzzle," concluded Khalil.

Key benefits

- Reduce costs while giving each desktop user greater functionality;
- Combine electronic documents, scanned images, email messages and attachments into a single, secure file;
- Collaborate with colleagues allowing them to review documents and to add their own notes and comments;
- Protect the firm and the client by redacting private and confidential information;
- Secure documents by removing document metadata and preventing document tampering;
- Create PDF documents within the Interwoven Worksite environment; and
- Profile a document directly into Interwoven WorkSite as a new document, a new version or an attachment to an existing document.