

Mackenzie Strategic Writes Off Inefficiencies with Nitro's Paperless Solution

MACKENZIE
STRATEGIC ACCOUNTANTS

About the Company

Mackenzie Strategic is a small-to-medium Australian accounting and investment management firm specialising in the rapidly changing taxation environment, succession and estate planning, growth strategies, regional and international expansion, and self-managed superannuation funds.

Mackenzie Strategic prides itself on its ability to build strong client relationships. With 35 members of staff working out of various offices in South Australia serving private and family-owned businesses, entrepreneurs and high net-worth individuals across the country, the firm currently has AU\$850M in funds under administration and an annual turnover of AU\$5.5M.

“**Good things happen** when accountants and clients work as a team.”

Mackenzie Strategic

The Challenge

Mackenzie Strategic handles many sensitive documents on behalf of clients including tax returns, application forms, contracts, lease agreements and property documents. Amanda Kennan, Strategy & Development Management Consultant at Mackenzie Strategic handled the deployment of Nitro and shares her experience, “*We wanted to improve internal efficiencies without having to go headlong into an engagement type process with a costly workflow management system.*”

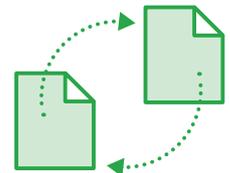
“We were just using the straight **Adobe products, which had certainly less functionality.**”

Scott MacKenzie,
Founder and Director at Mackenzie Strategic

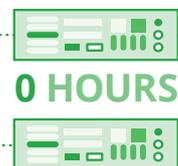
PROVEN
Results



Immediate document
turnaround



Improved Internal
Workflow



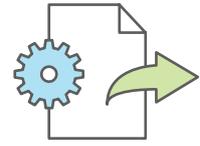
Zero Time Spent on
Deployment

After initially using Adobe, they realized their staff wasn't comfortable with the software and most never even used it. *"After we brought in Nitro, our staff started playing with it and experimenting with the functionality, finding lots of wonderful ways of using it,"* Kennan points out.

Another big concern was security. *"Through Nitro, we're able to black out sensitive information like tax file numbers before sending. As cloud technology becomes more common, our clients have become more accustomed to clicking on a link to open a document and have more trust in that type of technology,"* according to Kennan.

The Nitro Solution

MacKenzie Strategic opted for Nitro Pro, which is a secure, scalable and comprehensive PDF solution for businesses of any size. The emphasis is on streamlining workflows and providing users with an intuitive way to create, edit and collaborate on digital documents. It's hosted on the company server and available to all staff.



Convert & Export

Revise content using your favorite programs. Convert PDF files into Word, Excel, and PowerPoint files, or create PDFs directly from Office.

"Nitro was a piece of the technology puzzle that fit really nicely because it's **given us a lot of functionality and enabled us to **streamline our business workflow processes**,"**

Amanda Kennan,

Strategy & Development Management Consultant at MacKenzie Strategic

In addition to Nitro Pro, the firm adopted Nitro Cloud, which enables its users to securely share documents, get notifications of when documents are viewed and modified, and turn signing and collaboration features on or off as required. Nitro Cloud also offers complete tracking and versioning, where users can mark-up, add comments and message other collaborators. Electronic signatures make signing documents simple with tamper-proof, legally binding eSignatures.

The firm initially invested in equipping a third of their team with Nitro Cloud, as they rolled out their document solution to employees who needed it the most. But after seeing how quickly the team and clients intuitively adopted the new technology, they have since increased their uptake by 40% to enable quicker turnaround across more projects.

Now when accountants are working on papers that need to go to managers and directors for review, they do it electronically. *"We have a record of where the documents are going, who's making comments on them and when they have been signed off,"* says Keenan.

"They (clients) can sign it on a phone, an iPad, with a mouse or keyboard on the computer, so functionality is really good," adds MacKenzie. The firm expects to have at least a third of its clients using eSignatures by the end of the financial year.

Key Benefits

One of the most obvious benefits of implementing Nitro is the ease of deployment and use. With a familiar UI, users can hit the ground running with little to no training. MacKenzie says Nitro's solutions have improved the entire management process of documents in the firm, *"In years gone by, some things might have been put on my desk and they get lost underneath in some other folders and then you realise you haven't signed it,"* he says. *"I sign tax returns or financial statements on my iPad at home at night — it is just very, very simple."*



Collaborate & Review

Nitro Pro offers a range of easy-to-use collaboration tools that ensure accurate version control.

“From a usability perspective it's been really easy - from installation, implementation and getting it deployed.”

Scott MacKenzie,
Founder and Director at MacKenzie Strategic

According to Kennan, *"We ran a few short training sessions, but we found that the staff just started playing with the software and discovered for themselves all the useful functions."*

Although MacKenzie Strategic's primary goal was to improve internal workflow automation, the efficiencies around achieving signatures on documents have made their lives much easier, especially during the busy tax return period.

"We have a record of where the documents are going, who's making comments on them and when they have been signed off"

Results

With Nitro Pro, efficiency improved dramatically, but the firm discovered the additional benefits of storing and moving files around in a secure electronic space with Nitro Cloud as the team continued using it. *"One member of my team was having to do things with a contract that had come through in the wrong format, but she converted it into a Word document, edited it, and then forwarded it on the cloud via Nitro requesting a signature. The whole thing from whoa to go, and actually then to be able to pay a deposit on this business, was just over an hour,"* says MacKenzie.

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Scott MacKenzie,
Founder and Director at MacKenzie Strategic

Kennan explains, *“The next step for us is to continue to educate our clients about eSignatures. Obviously some clients are more accustomed to using new technology, but some of our more traditional clients are taking longer to bring around. But for us, the more we can use eSignatures, the quicker it is to get documents back and signed quickly—then we can take action straight away.”*

“With eSignatures we tend to get **signed documents** back pretty much **straight away** if not the very next day, which is great,”

MacKenzie Strategic also noticed that they weren't losing documents anymore. With Nitro Cloud, they have the ability to track the progress of the document and follow up with clients. *“Now we know if a client has viewed something but hasn't signed it so we can give them a call in a day or two and ask if they have any questions or concerns. It allows us to work in real time and provides visibility to our admin team on where all our contracts are at,”* Kennan concludes.



Sign & Secure

Nitro Pro makes it easy to sign and certify your documents while keeping your work secure, so confidential information remains private.



For more information, call your sales person or visit

www.GoNitro.com