



## The cloud is where you need to be

How Onvio® Firm Management has improved workflows and flexibility for the staff and clients of **The Koenig Group, L.L.C.**

*The implementation of new technology is essential and supported by The Koenig Group, L.L.C. who have seen the rewards over time.*

They are a 24-person firm in Clark, New Jersey led by three partners who specialize in comprehensive tax compliance and business advisory services along with complete outsource accounting solutions. Specializing in small businesses, their clients rely on their expertise in the industry as well as financial advisement.

The tax and accounting profession is notorious for fearing change and more and more firms are realizing the competitive benefits that modern technology provides. James Sosinski, CPA and Partner at The Koenig Group, shares how his firm has grown through the implementation of new solutions. "There is very little our clients need to go outside of our firm to accomplish. From processing tax returns to payroll, our clients appreciate the one-stop shop, and we have attracted more clients because of the simple model. The most important thing for our clients is that they don't need to deal with multiple people in various accounting firms



In addition to keeping the client happy, firms also juggle the need to attract and retain staff, increase productivity, and build efficient workflows. As a loyal supporter of Thomson Reuters® products for many years, James took these struggles into consideration when making the decision to implement new technology within his firm.

“I was fully onboard with the concept and methodology,” notes James. “I know the ‘cloud’ is where we need to be.” This was not a hurdle for him. Instead, he anxiously waited for the technology to be available with excitement.

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His firm implemented Onvio® Firm Management in the summer of 2020 and has been gradually integrating several featured solutions into their workflows and collaboration processes between staff and clients. One notable improvement recognized by James and the firm is Onvio’s document management system.

“It gives us so much flexibility, robustness, and features that we didn’t have in FileCabinet CS,” explains James. “I love not having to send clients password-protected PDF files. They’re getting a password-protected link that allows them to open password-protected files. It’s the nature and way Onvio works that makes it a lot easier, sensible and logical.”



In addition to Onvio's document management flexibility, James notes that the cloud feature has allowed more remote freedom as well. "The fact we're now on a cloud-native system that can be accessed 24/7 anytime, anywhere, and you're not forced to go through the high-security protocols of dialing back into the office, is a key feature. We're bypassing a lot of other technology that we would have to otherwise maintain manually. The mobility of being able to do our work anytime and anywhere is probably our biggest advantage, because you're not worried about dialing in or remoting in access," says James.

To help with the setup of new clients, the tax questionnaire available in Onvio Firm Management has provided his firm a noticeable time savings. "Once the tax questionnaire request is sent to a new client to complete, they are able to capture all their details correctly from the start. This includes their full name, email address, and demographic information. All the information that we previously collected manually or by a PDF form can now be done by the client through the portal. That is heaven."

*"I would absolutely recommend this product ... Onvio is where you and your firm need to be."*

— James Sosinski, CPA and Partner at The Koenig Group

To prepare their clients for the portal, the Koenig Group, L.L.C., created their own 'quick start' guide that shows clients how to set up their account using either a desktop or mobile device. It also addresses some frequently asked questions. Furthermore, Onvio is also accessible through a convenient link on their website.

When the COVID-19 pandemic hit, firms were forced into a remote working environment. Because of this shift, James and his firm were thankful for the opportunity to roll with the changes. "One thing we learned from the pandemic is that there are two different levels of remote preparedness," notes James. "There is the individual remote access level and whether your firm workflow is remote capable. You may be able to remote in, but all the client paperwork is still on desks."

To ensure that their firm was on the right side of preparedness, they set up client projects in Onvio Firm Management to track the tasks assigned to all firm staff and the current status. "No matter where you are, you know exactly what you're doing."

James and the Koenig Group, L.L.C continue to build their firm on the foundation of Onvio Firm Management. "I would absolutely recommend this product. If you are a Thomson Reuters user that does not have it in your mind that you need to be using Onvio, your firm is either going to collapse, or you are just not going to be around much longer. Onvio is where you and your firm need to be."

**To learn more about Onvio Firm Management, visit**  
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or contact us at 800-968-8900.

