

Case study

Yamazaki Accounting & Consulting Firm

»If it is saved as digital data, it is very easy to search and reference information. Whenever customers have requests, I can respond very quickly.«

Osamu Yamazaki, Yamazaki Accounting & Consulting Firm



The customer

Mr. Osamu Yamazaki, who is a certified public accountant, tax accountant, and small and medium enterprise management consultant, opened a local accounting and consulting firm in 2009. For 10 years he had worked at a major accounting firm in Tokyo, but decided to establish his own independent tax consulting firm to invigorate the town's business economy.

The challenge

An entrepreneur faces many challenges in starting his own firm. Mr. Yamazaki realized that while he was pleased with the growth of small and medium sized business customers, he was wasting a lot of time on daily manual tasks such as filing numbers and making copies.

"When I was at the big auditing corporation, I could give these tasks to the support staff, but since starting my own business, I'm responsible for every task. This kind of organization is necessary for tax account work, but I wanted to spend my time adding value for customers. So I searched for a way to make my office paperwork more efficient."

Mr. Yamazaki is passionate about technology and had tried various devices to find the perfect hardware for his digitization needs. In addition to efficiency, he wanted a mobile option to take on client visits.

"My job requires me to visit customers' offices often. In the past, I had to bring the stacks of bills and receipts back to my office, record the information I needed, and then make another trip back to the client to return the documents. This process was time consuming and I knew there was a risk of losing or damaging the papers. The ability to scan customer receipts immediately at their office is not only convenient, but also a smart business practice."

The customer

Customer: Yamazaki Accounting & Consulting Firm
Country: Japan
Industry: Financial Services

The challenge

One of the burdens that Mr. Yamazaki faced was holding original copies of receipts that were regularly sent by customers for book keeping for a relatively long time. Bringing back these copies of invoices and receipts, and returning them afterwards, not only takes up time and cost but also risks loss or damage. Moreover, it costs customers time and money when customers made copies of the documents whose original were not required for auditing purposes.

The solution

With the iX500's ability to scan receipts of different shapes and sizes, original copies can be returned to customers quickly. The mobile S1300 reduces the amount of paper he needs to carry back from customer offices. The scanners are especially helpful when customers bring volumes of contract documents.

The benefits

- Enabled documents to be quickly searched and referenced whenever necessary
- Eliminated the risk of misplacing important client papers or files
- Reduced cost and time resources during a financial audit
- Streamlined the data transfer process

The solutions and the benefit

Currently, the iX500 sits next to Mr. Yamazaki's office desk in a prominent place, and is used often as his main scanner.

"In daily work as a tax accountant, I regularly scan many receipts from customers."

With a quick scan, Mr. Yamazaki can enjoy the convenience of digitizing a customer's important information which enables him to return the information to the customer quickly, even from papers and receipts with mixed sizes.

"The iX500 is a very valuable scanner for me. Although I currently input information from small receipts manually, its speed will allow me to quickly scan small or large receipts in one batch, saving a significant amount of time."

The scanner is also used to scan and save the deliverables of both tax and accounting related work.

"We scan tax forms and reports for audit purposes before providing it to the customer. I do keep some essential paper documents just in case, but if it is saved as digital data, it is very easy to search and reference information. Whenever customers have requests, I can respond very quickly."

Mr. Yamazaki has opportunities to use the S1300 outside the office. Because he can scan many pages continuously with a single push of a button, he finds it more convenient than bringing the original documents back to the office. Different from making copies, it enables him to reduce time and cost for the customers.

"I also bring the S1300 with me when visiting customers for financial audits. Although I need to make paper copies for evidence-related documents such as contracts and invoices, others can be scanned and saved, which is significantly easier. The process is especially useful for concerned clients that have many contracts."

Mr. Yamazaki finds the new iX500 very light and convenient, so he even thinks of taking it to client offices when a lot of paperwork is expected.

Products and services

- ScanSnap iX500
- ScanSnap S1300

Finally, ScanSnap is very useful for due diligence work (pre-investigation of investment or M&A) because it can handle paper handouts such as balance sheets.

"In due diligence work or business revitalization work, I need to review the company's balance sheets from the last 5-10 years. I have to transfer data from paper to Excel when clients do not have digital data or the original data that is in another software cannot be transferred to Excel by the clients. This should not be done by another person due to confidentiality."

In these cases, he can use ScanSnap's conversion to Excel document function.

"It very conveniently inputs data in Excel, and provides the option to edit. Compared to manually inputting numbers from a balance sheet or profit and loss statement, it makes a significant impact on my productivity."

Conclusion

Mr. Yamazaki connects his ScanSnap to his cloud. He is able to store important materials, and access them whenever and wherever he needs them from his tablet, PC or smart phone. For financial audits and due diligence, which require him to cooperate with other experts, workflow and information sharing can be improved by having everyone involved upload their scanned documents to the cloud.

"I hope that in the future, customers can utilize the cloud for their own scanned data. Consulting will become more immediate through information sharing, and we could view contracts and advise clients on decisions more quickly. Sometimes it is hard to read letters in a document that are sent by FAX."

ScanSnap will assist Mr. Yamazaki in improving his hometown's small business environment.

Contact

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