



Mize CPAs Inc.

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CPAs Inc.

Renewing Document Preparation And Mailing Operations For Guaranteed Speed, Accuracy, And Security

Lineage Accelerate partnered with Mize CPAs Inc. to revolutionize their document distribution processes. By implementing the DS-200i folder/inserter, they achieved significant improvements in efficiency, accuracy, and document security, ensuring the timely and secure delivery of sensitive financial information to their clients.

Snapshot

Mize CPAs Inc., formerly known as Mize Houser, is a well-established accounting firm offering a wide range of services, including audits, financial planning, financial reporting, IT, payroll services, tax preparation and planning, and bill processing. With offices in Topeka, Lawrence, and Overland Park, Kansas, Mize CPAs has become the 12th largest firm in the Midwest, according to Accounting Today. As the company expanded its client base and services, it faced challenges related to managing and distributing a growing volume of critical financial documents.



The Problem

Elaine Thomas, Mize CPAs' Purchasing and Mailroom Coordinator, understood the significance of maintaining accurate and secure information in the firm's mailings.

Their mailouts included a variety of documents, such as paychecks, AP billing statements, HIPAA-sensitive medical billing statements, and more.

As the company continued to grow, the need for accuracy and efficiency in mail preparation became increasingly crucial. Furthermore, the aging machines used for these tasks needed an upgrade to keep up with the company's evolving demands.

"We just needed to step it up to better meet our workload," said Thomas. "And then, honestly, we just wore out the machines we were using, so it was time to upgrade."

"When you use Lineage, you're going to get top-of-the-line products and outstanding personal service... but it's that personal touch that keeps it going."

– Elaine Thomas

Purchasing and
Mailroom Coordinator,
Mize CPAs Inc.

The Solution

When Mize CPAs looked for a solution to their outbound mailing challenges, they turned to Lineage Accelerate, an expert in document distribution solutions.

Lineage Accelerate, known for its top-of-the-line products and exceptional personal service, offered the perfect solution to meet Mize CPAs' needs. Joe G., a sales professional in Kansas City for Lineage Accelerate, recognized that Mize CPAs required a solution that guaranteed precision, privacy, and efficiency in their mail prep processes. The DS-200i folder/inserter from Lineage Accelerate was identified as the ideal choice, ensuring that critical documents would be handled accurately and securely.

"These are critical pieces of information that go out in these mailings," said Germano. "There's no room for doubts. Our clients don't want those doubts, and their clients won't stand for them, so it's essential that accuracy and privacy be strictly adhered to. The DS-200i offers the precision that Mize CPAs was looking for, and it's been a good match."*

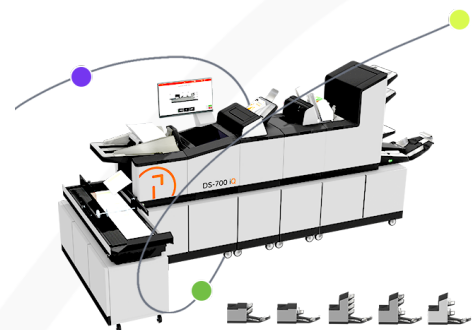
***Quadient's DS-200i has since been replaced with the improved DS-700 iQ.**

The Results

The implementation of Lineage Accelerate's DS-200i folder/inserter marked a significant transformation in Mize CPAs' document distribution strategy.

The enhanced workflow automation and efficiency allowed Mize CPAs to improve the speed and accuracy of their mail preparation, benefiting both their internal accounting departments and their clients.

This change in document distribution positively impacted their business and tax services, ensuring the secure and timely delivery of variable documents, particularly those containing sensitive personal information. Enhanced document security measures were put in place, ensuring that confidential client data was safeguarded throughout the mailing process, instilling trust and peace of mind among their clientele.



When dealing with variable documents, the DS-700 iQ guarantees precision and reliability. It's equipped to handle the intricacies of accounting, taxes, and billing, where accuracy is paramount. The Automated Insertion Management System (AIMS) meticulously verifies and calibrates each document, ensuring that they are inserted into the correct envelope without errors, every time. No more missed or double feeds—just seamless, error-free document preparation.



“It was time to upgrade,
and we chose Lineage
Accelerate.”

Conclusion

Mize CPAs Inc. (formerly Mize Houser) and Lineage Accelerate have maintained a strong partnership for over a decade.

The success of this collaboration can be attributed to the outstanding products and personalized service provided by Lineage Accelerate. The relationship between the two entities has flourished, with Lineage Accelerate's commitment to delivering top-of-the-line products and exceptional support contributing to Mize CPAs' operational efficiency and client satisfaction.

“We've had a really good working relationship with Lineage, and I like the way they go about things,” said Thomas. “When you use Lineage, you're going to get top-of-the-line products and outstanding personal service. Yes, it saves you time and money – which are great things, of course – but it's that personal touch that keeps it going.”

In conclusion, the partnership between Mize CPAs Inc. and Lineage Accelerate has not only optimized their document distribution but also strengthened their bond over the years, offering a winning combination of cutting-edge solutions and exceptional service.

About Lineage

PURPOSE: Honor God by serving, supporting and caring with excellence.

MISSION: Transforming business critical communications from creation to distribution.

COMMITMENT: We come through for our customers. We come through for each other.

Neither rain nor snow nor gloom of night, nor a heavy workload, nor even a really, really bad cold will stop us from the swift completion of our mission. We come through.

