



Tax Automation for the Win:
How the Right Workflow
Automation Platform
Benefits Firms, Staff,
and Clients

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A winning workflow automation platform benefits both the firm and client side of the tax engagement. Automation of tedious, repetitive tasks helps improve the efficiency on the firm side which cuts costs. A smoother experience on the client side clearly communicates the firm's commitment and care. When both sides benefit, it is most certainly a win-win situation.

A winning tax workflow automation platform increases a firm's efficiency which, in turn, helps:

- Alleviate the burden on staff
- Automate tedious tasks
- Attract and retain forward thinking talent

What does the right workflow automation platform look like? A myriad of challenges impact a firm's efficiency. How do these factors influence firm productivity, and which can be addressed by a winning tax workflow automation platform?

Challenges Firms Face

First, a look at some of the top issues firms are facing according to the 2022 AICPA Private Companies Practice Section (PCPS) CPA Firm Top Issues Survey data released at the AICPA & CIMA ENGAGE 22 conference:

- IRS challenges
- Finding/retaining qualified staff
- Keeping up with changes and complexity of tax laws
- Keeping up with COVID relief programs, such as PPP, EIDL, ERC, etc.
- Developing the next generation of firm leadership
- Keeping up with changes in technology and managing associated costs

It's clear that firms are facing multiple factors when it comes to the delicate balance between providing client service and not overworking staff. Addressing these issues, along with anticipating which trends in technology will have the most impact firmwide, enhancing the ability to meet clients' needs, is the lens to look through when evaluating a tax workflow automation platform.

Top 3 Things to Evaluate When Looking for a Tax Workflow Automation Platform

Price

Finance is a factor in everything a business does. From paper clips to payroll, cost matters. There must be value in a firm's expenditures. Don't let the elephant sit in the corner. Get the bottom-line impact out of the way first.

Pricing that is transparent and all-inclusive makes budgeting a breeze. Cheap isn't always inexpensive. An amazing deal can be had on paper clips only to find out that they are a new "bend-them-yourself" style which end up costing more in time and frustration than any dollars saved in the initial price.

How does this translate to a tax workflow automation platform? Take a look at what is included in the pricing. Is it a yearly subscription of the "use it or lose it" variety, or is it straightforward pricing that doesn't expire? How much down time is required for software implementation – and will subsequent down time be necessary for future upgrades? What training is provided and what is included with training fees? How long/extensive is onboarding and training? What costs are incurred for refresher training? How is support handled and are there limits or costs involved?

Look for a tax workflow automation platform that streamlines your systems across the entire tax engagement. Are tools included that ensure each season of the tax year is addressed? Will your firm realize time savings and reduced material costs? These are important features to seek out when evaluating the vendors and tools that make up your firm's procedures throughout the year. A single-source workflow automation platform that can reduce the number of vendors and tools while providing the services your clients expect – and even enriching their experience – is a great value.

The SafeSend Suite™ is a tax workflow automation platform designed to automate every client touchpoint from organizers and engagement letters to tax returns and extensions. Pricing is simple and straightforward.

Staff

When a workflow automation platform has clear pricing and also streamlines procedures in your firm, it's a winning automation combination. Reducing the time staff spends on labor-intensive tasks increases their work-life balance, which also increases staff retention.

Each client touchpoint across the tax engagement requires an investment of staffing time. Every season of the tax year presents new tasks and responsibilities that are rapidly transitioning from a paper-based system to a digital environment.

Choosing automation solutions to address each of these touchpoints can be daunting. Multiple automation solutions often do not work with each other, presenting a challenge to staff when each step of their task is in a different "silo." One tax workflow automation platform that covers it all isn't just a win, it's a gold-medal win.

Look for a solution that can collect e-signatures on any document at any time throughout the year. Will it mail merge and batch process your engagement letters? What about a one-off consent form or POA? It is important to have a solution that can handle all types of documents and be simple for staff to utilize as well as easy and familiar for clients to use.

Also important for staff – tracking and reporting capabilities in order to know where each client is in the process and which documents are still outstanding. Knowing the status at the click of a button cuts way down on follow-up calls saving valuable staff time. Keep these points in mind as you evaluate a workflow automation platform. Unlimited use of SafeSend Signatures™ is included in the SafeSend Suite, providing an e-sign solution for bulk or one-off documents year-round.

Client organizers are another factor that involves a lot of staff time and should be looked at in your evaluation process. The option for a digital, fillable client organizer that works not only cuts down on the time staff spends printing, collating, and mailing client organizers, but also removes the burden from the client to print, complete, and scan or mail back a hard copy. It also increases the document return rate when clients can complete the organizer digitally and upload source documents as well. SafeSend Organizers™, part of the SafeSend Suite, streamlines the collection process of organizer information.

Reducing the assembly and delivery time of completed tax return packages is an enormous win. Look for a workflow automation platform that includes automating that "last mile" of the tax engagement. The fewer tedious tasks that staff have to deal with like affixing 'sign here' stickers, assembling completed returns, or stuffing envelopes, the more time they have to focus on higher-level projects.

A workflow solution that automates manual tasks, provides comprehensive reporting and tracking that all staff have access to, provides secure K-1 distribution, and includes automated follow-up is not only a win for your firm, but also for your clients. Award-winning SafeSend Returns®, the core of the SafeSend Suite, addresses all these points. It also incorporates the billing process, so you don't have to chase tax-prep payments, and provides payment options for your clients to manage and pay their taxes online.



Clients

If the client experience isn't desirable, it doesn't matter if everything looks great from the firm's perspective when you're evaluating a tax workflow automation platform. Clients are the reason a firm does what it does, so everything ultimately comes down to the client experience.

Does your tax workflow automation platform provide quick, convenient access to documents? Are they guided through the process and is it simple to understand? Is it familiar to them, or do they have to remember multiple passwords for multiple vendors? Can they complete their taxes and sign any necessary documents from anywhere in the world on any device? Is the process secure?

These are important points that can make or break the client experience. If a process is easy on your staff (like sending out a digital, fillable client organizer) but overwhelming for a client (having to print that PDF then scan it back in once it's completed) it isn't a win-win solution.

The SafeSend Suite provides a sophisticated, yet simple, user interface that is familiar to clients from engagement letters and organizers to tax returns and extensions. This powerful tax workflow automation platform is as straightforward for businesses returns as it is for personal returns. Additionally, documents are stored for seven years so clients have easy access to their documents should they need to send to banks, etc.

Providing an optimal experience for your clients says a lot about the relationship you have with them. The SafeSend Suite tax workflow automation platform eliminates clunky experiences for both staff and clients.

"Using SafeSend Returns was fast and unbelievably easy. The prior way was cumbersome. When my accounting firm sent over the tax package, it was so easy. I reviewed and signed on my computer; my wife used her phone. It was seamless. The process for my corporate return was also very fast. I was able to download it, save it, and distribute it easily to the bank and the advisory board."

*- Jerry Archer, President,
Archer Sign Corp, 415 Group client*





Evaluate, Choose, and Celebrate the Win

It may not always be the IRS or staffing that top the list, but there will always be challenges. Finding the best solution to address those challenges doesn't have to be difficult. With the right tax workflow automation platform, your firm can elevate client service and improve your staff's work-life balance while still being kind to your bottom line. Evaluate thoroughly, choose wisely, and celebrate the benefits a winning tax automation decision provides to your firm, staff, and clients.





About the SafeSend Suite™

The SafeSend Suite workflow automation platform offers powerful functionality to tax and accounting professionals to address every client touch point across the tax engagement. Automate the manual tasks often associated with the back and forth of client communication through each season of the tax year!

- Engagement Letters - SafeSend Signatures™
- Client Organizers - SafeSend Organizers™
- Assemble & Delivery - SafeSend Returns®
- Secure File Exchange - SafeSend Exchange™
- Extensions - SafeSend Extensions™

At the core of the suite, SafeSend Returns, a multi-year winner of the CPA Practice Advisor Technology Innovation Award, eliminates the manual, labor-intensive tasks many tax departments experience during the assembly and delivery of client-ready tax returns.

Visit the [SafeSend Suite](#) page of our website to learn more about automating your tax engagement workflow and schedule a demo!



About SafeSend®

SafeSend's mission is to automate the tax and accounting profession with innovative, emerging technologies that help practitioners work more efficiently and serve their clients better. Progressive accounting firms and tax professionals rely on our unique and robust solutions to make their lives easier and their work more enjoyable.

SafeSend offers several foundational technology solutions for the tax and accounting profession. Our flagship offering, SafeSend Returns® is a multi-year winner of the CPA Practice Advisor Technology Innovation Award and has redefined the way accounting firms digitally assemble, securely deliver, and quickly capture e-signatures from clients for completed tax return packages. Additionally, we offer TicTie Calculate®, an Adobe® Acrobat® plug-in for accounting professionals.

Visit safesend.com to learn more about our digital solutions.

