



WHITE PAPER

Transform your firm's tax workflow:
5+ proven strategies to eliminate
low-value tasks

Intuit® ProConnect™ Tax



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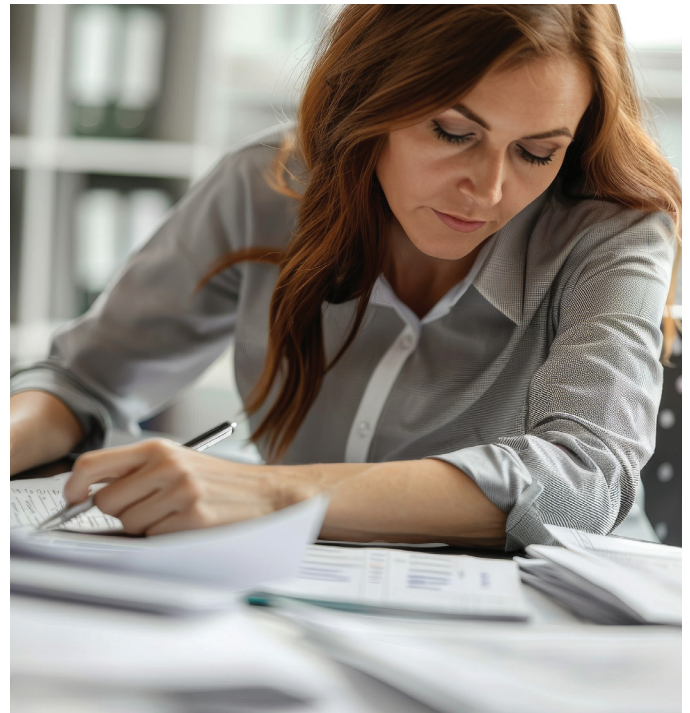
Executive summary

ICYMI: You can streamline your systems and processes, get more done in your firm, and provide the services and advice your clients need and crave by getting rid of low-value tasks.

Did you know that professionals spend up to 62% of their time on repetitive mundane tasks such as data entry and filing? How about the fact that paper-based processes are still happening in close to 25% of firms?

There's no doubt that tax preparation and filing have come a long way in the past 20 years—and tax professionals have powerful advancements in technology to thank for that. From fillable PDFs to auto-filled documents and e-filing, there are a wealth of time-saving methods to make tax preparation easier, quicker, and more efficient.

Yet, the issue of spending too much time on matters that aren't necessarily revenue-generating still exists.



Although we know all about state-of-the-art technology, plenty of firms continue to deal with stacks of physical paper, numerous software programs, and disconnected systems, which can all result in costly mistakes. Processes become further muddled when too much time is spent on non-revenue generating work such as data entry, report generation, file organization, and routine client communications. This is commonly referred to as “low-value” work.

That's where technology can (again) come in to help. There is newfound awareness around the importance of automations, integrations, and adopting new technologies. With the addition of sophisticated software capabilities, as well as outsourcing and improved communications, low-value tasks can be eliminated from your workflow.

Key issues highlighted in this whitepaper

Eliminating inefficient workflows and processes: Many tax and advisory firms continue to rely on paper documents and a range of disconnected software programs, leading to data entry errors, complex workflows, and wasted time. This outdated approach to low-value work is a drain on effort and resources.

Using technology for automation: Simple and repetitive tasks are just that: simple and repetitive. They constitute the kind of work that

can be automated by sophisticated software and systems. Automating them is the best way forward to save time, money, and effort that can all be spent on helping your clients with higher-value work.

Standardizing processes: Checklists and streamlined protocols can help standardize the work you and your staff do every day. In turn, this standardization allows you to outsource low-value tasks so senior-level team members aren't bogged down with them.

The problem: Low-value work clogs your workflow

Tax and advisory firms often have complex workflows that involve doing many tasks manually in order to get the day's work done. These small, burdensome duties fall into a category known as low-value work because they typically do not generate revenue for your business. This type of work varies depending on your firm's focus. Perhaps you generate a high volume of returns with a low number of employees, or prioritize being a true partner to business owners by providing reporting, analysis, and planning.

As a tax-focused firm, you're likely familiar with time-consuming tasks that clog up your workflow. Think about manual data entry, adding new clients to your software, converting data from one software program to another, and transferring information from paper documents into your systems. Then there is the ever-present duty of following up with clients and sending them periodic reminders about what you need to meet important filing deadlines. All of this leads to complex workflows, data entry errors, and above all, wasted time.

Similarly, tax and accountant advisors may find themselves in the cumbersome process of manually pulling data for clients from their software. Working across multiple mediums, including balancing different bookkeeping solutions, and incorporating information from physical papers into your digital work only adds to the complexity.

Take a look at these statistics:

- Among knowledge workers, repetitive mundane tasks such as data entry and filing make up 62% of their workday, according to Asana's 2023 [Anatomy of Global Work Index](#). These might be among the tasks traditionally assigned to newer members of the profession such as recent college graduates, or simply may be a seemingly unavoidable part of the job.
- Almost 25% of accountants in a 2024 survey conducted by [Canopy and the CPA Practice Advisor](#) said they still run their practices with some paper processes.
- Technology is crucial for the future of the tax and accounting profession. According to the [2024 Intuit QuickBooks Accountant Technology Survey](#), accounting professionals believe that failure to keep pace with technological advancements poses the greatest risk to the industry – and plan to invest in AI and automation tools the most to stay ahead.

But they don't have to be. With streamlined software solutions that facilitate efficient processes and logical systems, low-value tasks can be easily offloaded.

Low-value work inhibits your talent pipeline

Even with increased attention to using technology efficiently and productively, senior-level tax professionals may still find themselves in the weeds with low-value tasks, especially if there are no junior members at their firm. It may seem obvious, but a firm works best when qualified team members are doing work at and above their level of ability, rather than using their time to complete low-value and often irritating jobs. The problem with low-value tasks, aside from putting stops in your workflow, is that they interrupt the profession's talent pipeline.

According to Tri-Merit Specialty Tax Professionals' annual [CPA Career Satisfaction Survey](#) conducted in association with Accountants Forward and HB Publishing & Marketing Company, mid-career middle managers, senior managers, and manager-level staff were the accountants least satisfied with their careers. In fact, according to the [Finance and the Great Reshuffle](#) report from the AICPA & CIMA in cooperation with PwC, almost a quarter of finance workers (24%) said they want to change their jobs within a year, while over half of respondents (52%) said employee turnover within their organizations was increasing.

Part of the problem for tax professionals? They do not have enough junior staff to handle basic-level work. When these mid-career accountants reach their wit's end, they're susceptible to quitting their firms or leaving the field altogether. But there's a simple way to prevent this from happening.



The solution: Eliminating low-value work with tech and standardization

Just as advancements in technology allowed for the advent of revolutionary processes such as e-filing—something we take for granted today compared to just a few years ago—new tech once again can swoop in to relieve employees of their most burdensome, tedious work. Not only can this result in greater efficiency and cost savings, but it can also boost job satisfaction and tenure.

Incorporating new technology boils down to a few key benefits: automation, standardization, and organization. Plus, for firm owners, letting tech and artificial intelligence do the rote work that can be automated gives you a more productive firm without necessarily needing to hire many new junior staff members. Ahead, find some of the main strategies for eliminating low-value work.

“The key to eliminating low-value work is making it work across hundreds of clients. You have to make sure you don’t drop any balls—and that everybody is talking to each other and implementing the systems for true coordination.”

– Liz Hanley, EA, Liz is All Biz

Strategy 1: Automate low-value tasks with technology

One of the most impactful things firm owners can do for their success and their team’s well-being is to automate non-revenue generating tasks. With new technology and the help of AI, manual data entry, cross-software data conversions, and client onboarding can be automated with a few simple keystrokes.

Scheduling new and existing client meetings can be automated, too, thanks to easy-to-use scheduling tools such as Zoom Scheduler, Calendly, and Acuity Scheduling. For further automation, you can set up recurring invoices and payments for advisory clients without having to peek at a calendar or send any reminders.

Strategy 2: Standardize processes with checklists and streamlined protocols

There are a wealth of small details to remember during the tax preparation process. Keeping them all straight in your head is certainly possible, but having handy digital checklists to refer back to can prevent errors and save time. Similarly, ensuring all team members follow the same workflow with streamlined protocols means a client's experience with one accountant is not markedly different from their experience with another accountant at your firm.

Strategy 3: Outsource non-core functions

Once you begin streamlining your workflow by automating certain processes, you'll have the information you need in order to outsource non-core tasks. These can include tax form preparation, document retrieval and scanning, basic calculations, and other jobs that aren't considered high-touch. One way to manage this? Consult with an agency or virtual assistant who will take on these jobs for you, ultimately saving on costs, boosting efficiency, and letting your internal team focus on compliance and more complex tax strategy.

Strategy 4: Accept documents only through secure portals

Compliance and security are top of mind for tax professionals, especially when conducting business online. Instead of procuring documents through a range of sources—from myriad portals to emails to snail mail—consider only accepting documents through a single secure portal. The same goes for collecting signatures. Rather than get bogged down with the tedious work of scanning and uploading signed documents, invest in a tax software suite that makes collecting electronic signatures a breeze. The combination of secure portals and eSignatures will remove several steps from your process, resulting in many saved hours of work.

Strategy 5: Prioritize proactive client communications and expectations

An important part of a tax professional's job is following up with clients and sending them periodic reminders about deadlines, document uploads, and more. These simple messages, often sent in email form, can take up valuable time to write. But by having them pre-written, scheduling them in advance, and automating sends—all with the help of AI—you can keep up with communications without having to sift through your inbox every morning. Consistent and proactive communications are now easier than ever.



7 tips for more valuable and efficient client communications

Establishing consistent communications and effectively managing client expectations is an important aspect of accounting. However, the periodic reminders, check-ins, and administrative work that comes with liaising with clients can be time-consuming. The takeaway? It's the kind of work that can be optimized to better serve your firm.

Much like low-value tasks, simple client communications can be streamlined, automated, and in some cases, outsourced. Wondering how to decrease time and effort while maintaining valuable client relationships? Here are some effective ways to make your communications with clients more efficient and impactful.

"We've been able to segment out the work by skill set so that we don't have any of our higher skilled workers doing any low-value work."

– Liz Hanley, EA, Liz is All Biz

1. Work from templates—then personalize

Many of the messages you send to clients echo the same ideas, words, phrases, and even instructions. From quarterly tax due date notifications to onboarding guidelines, you and your team are likely firing off numerous similar emails each day. Saving time on typing these routine notes would allow you to work on more complex client needs.

To do that, prepare a series of email templates to have at the ready for a variety of common topics, especially recurring ones, including deadline reminders. Many email clients let you save templates, while text replacement software such as TextExpander, PhraseExpress, and Text Blaze can autofill templated text with the use of a keyboard shortcut. With templates to work from, you can also offload the sending of client communications to more junior-level staffers or outsourced workers.

While it's important not to have these templates sound stiff or robotic, it's worth it to add elements of personalization to each email. Depending on your relationship and the nature of the message, you could mention an account-specific detail or something a bit more personal. For example, if you and your client discussed the Red Sox game the last time you spoke, a nod to a recent game could be a way to deepen client rapport and trust.

See the example of an email template you might use to send to a new client.

Sample accountant email template

Hi [CONTACT NAME],

Welcome to [YOUR FIRM'S NAME]! It's great to have you with us. We're looking forward to helping you streamline your finances and achieve your business goals.

Before we get started, there are a few things we need from you in order to onboard you into our system. The sooner we receive this information, the sooner we'll be able to begin working together.

Please upload the following documents using [this secure link](#) by [DATE]. It shouldn't take more than 10 minutes to complete.

- [ITEM 1]
- [ITEM 2]
- [ITEM 3, etc.]

Once we've received all of the above, [CLIENT MANAGER NAME] will give you a quick call to schedule your kickoff meeting.

If you have any questions in the meantime, please don't hesitate to get in touch.

We look forward to speaking soon,

[YOUR NAME]

2. Provide proactive educational content

If you're an accountant who mainly communicates with clients ahead of, and during, tax season, you've probably sent messages expressing appreciation for their business during slower months. Providing educational content to clients *before* they need it is an excellent way to keep in touch and have them feel they are getting added value from your firm and working relationship. Use the off-season to build out content you can schedule to send throughout the year. Examples include topics on deductions or credits, links to helpful webinars, or distilling tax guidances and important deadlines from the IRS into an easy-to-read format.

3. Avoid jargon

Educational content only builds client trust if your clients can easily understand what is being sent. To that end, make sure to avoid jargon in your emails, videos, and other areas. As the [Journal of Accountancy](#) notes, accountants have their own vocational language. When it's used with people who are unfamiliar with it, you run the risk of alienating them. Instead, prioritize the use of terms that are clear and easy to understand for a general audience.

4. Incorporate data into your communications

Similarly, it can be helpful to explain more complicated financial topics with charts and data. Whether that's internal data on client satisfaction or tax statistics, incorporating data into your communications can help a client feel in the know.

5. Use a secure portal, not an inbox

If your firm decides to enlist junior members to work on client communications, that member might be sending emails to a long list of clients. When it becomes your turn to interface with a client, you likely won't have an idea of what's already been said unless you ask them to forward existing email chains.

In other words, sending out individual emails means communications are only immediately visible to the sender in their inbox. To combat this, you can decide to only communicate with clients through a secure portal. If you've successfully set up a portal for your clients to onboard them, then it's easy to continue using the portal for communications. This allows you to see what concerns clients have expressed previously, what questions they've had, and how you can build off their most recent interactions—ultimately saving time while keeping the client relationship strong.

6. Keep communication consistent

Sporadic emails, no matter how informative or customized, can be jarring to your client. By setting up regular automated messages and pre-scheduled notes, you can stay on top of the most important communications without having to dedicate copious time to planning and writing them.

7. Know when to write it yourself, and when to outsource it

Analysis of proposals and changes to tax law are the domain of experienced tax professionals—these are the kind of high-value communications that require expertise and experience to write. The end-of-year holiday greeting for clients? That can be outsourced. Be rigorous in determining which communications only you can write and which ones can go to a virtual assistant, marketing firm, or intern.

How one business owner tackles low-value work

For Liz Hanley, managing partner of Liz Is All Biz, removing tasks from her team members' plates that weren't leading to increased revenue has been integral to her firm's success. For her majority-female firm, job satisfaction and flexibility are key.

"I'm very passionate about women in accounting and finance," she says. "Part of that was making sure we had very flexible work arrangements for those that had just other responsibilities, whether that was with their family or other things going on. Work has always been extremely flexible for my staff."

Much of that flexibility comes from remote work; her staff has been fully remote for the past 10 years. A highly systemized workflow also makes a difference. We sat down with Hanley to see how she's eliminated low-value work from her firm across the board.



Elizabeth Hanley, EA

Liz Is All Biz, Inc.

Managing partner

Firm name: [Liz Is All Biz, Inc.](#)

Firm size: 15 employees

Location: San Francisco and New York

Primary services: Taxes, accounting, and advisory services

Average number of clients: 800

Tech stack: [Intuit® ProConnect™ Tax](#), [QuickBooks® Online](#), [Karbon](#), [Dropbox](#), [Syft](#)

Q: How do you structure your team in order to create an optimal workflow?

A: So many bookkeepers came to me and were used to doing one client, soup to nuts. They were doing the accounts payable, the reporting, and the analysis. For us, we were able to segment out the work by skill set so that we don't have any of our higher skilled workers doing any low-value work.

The key to eliminating low-value work is making it work across hundreds of clients. You have to make sure you don't drop any balls—and that everybody is talking to each other and implementing the systems for true coordination. That was the thing that took us the most time: How do you make all those pieces work together and how do you get all that integrated?

Q: [Have you had some non-traditional hires in your firm?](#)

A: Yes! One of my best hires was a film editor, which you wouldn't think would work in a tax and accounting firm, but if you think about what film editors do, they have to work with technology. They have to be very precise and be very attentive to detail. This was one of my best hires.

Q: [How are you automating low-value tasks at your firm with technology?](#)

A: Building out our review process has been important. Karbon has been able to help make everything highly systemized. Now, senior members can review work from outsourced staff, knowing exactly what they're looking for so they can discover problems quickly. We've also used Syft reporting, which has a tech stack that can discover anomalies.

Q: [Do you have processes in place to standardize your firm's workflow?](#)

A: We have this really stratified way that we work and it's all based on automatic notifications. If one person is done with their work, it shows up in the next person's queue. In other words, when Person A finishes something, it then moves to Person B, who does the next thing. Now it's all automated. With as many clients as we have, having a process like this is absolutely necessary.

Q: [Part of being an advisory firm is consistent communications to your clients. How are you doing this?](#)

A: We do internal training on this to help the team talk to clients. Because we're meeting with clients quarterly, we are really trying to standardize, streamline, and professionalize how we're communicating to clients.

When you're doing 800 reviews, for example, those emails can get kind of short. So being able to have all of the information—where one of my team members isn't having to type it out, or copy and paste it—is going to help us deliver our services.

Q: [How does ProConnect Tax help you be successful as a firm?](#)

A: It's all in one place. ProConnect Tax reduces administrative time by having everything together so you can't lose anything. That's why we use ProConnect. For example, if you are tagged in to deal with a client you've never seen before, you would have all the context right there: everyone's notes, all the documents, and all the materials from the client. If you want to see the emails, they're all in Karbon. Everything is completely centralized. If you have as many clients as we do, you're just never going to remember all of those things.



How ProConnect Tax eliminates low-value work during tax season—and beyond

There's a simple way to prevent low-value tasks from derailing your day: [ProConnect Tax](#). This cloud-based professional tax software allows you to create tax returns in minutes, anywhere you want to be.

Unlike any other tax software on the market, ProConnect Tax seamlessly integrates with [QuickBooks Online Accountant](#), ensuring all of your clients' data is centralized and accessible in real time. ProConnect Tax streamlines workflows, eliminates manual data entry errors, and saves time by creating efficiencies that are truly timesaving.

One of the newest features built into ProConnect Tax is Intuit Tax Advisor, an integrated advisory tool that automatically generates strategies for client tax savings. Intuit Tax Advisor is the only tax software that combines QuickBooks Online Accountant and Intuit Tax Advisor for maximum productivity and exceptional results.

Notable features

Much like technology, tax rules can change in an instant. In order to help keep you and your clients in the know, Intuit used client feedback to develop smart features, including the following:

- **IRS transcript direct access:** You can pull all of your client's transcripts directly from the IRS into ProConnect Tax; complete tax returns faster and more accurately with less client back-and-forth tasking.
- **Checkmarks:** Stay on top of changes to your clients' returns with review checkmarks. Mark the fields you want to watch. Whether changed by someone else in your practice or if there

was a change in tax law, you'll know if the data in your marked field was changed and requires review when it's marked with a red exclamation point. If it's marked with a green checkmark, then it's ready for e-file. You can also generate a report of all your marked fields to see all changes at a glance.

- **Customized client letters:** Instead of typing emails manually to notify clients of flags, your firm can send templated letters with preset and customized tax return data fields.
- **1040 import:** Generate a tax summary comparison for the current tax year by creating a new client and using the relevant information from their previous year's 1040 form.
- **Seamless data conversion:** Intuit's Easy Start team of onboarding experts help customers just like you. They'll walk you through the process to ensure your clients' data is converted accurately.

Intuitive tools embedded in ProConnect Tax are among the integrations that save users money, time, and energy:

- **Intuit Tax Advisor:** Now built in to ProConnect Tax, Intuit Tax Advisor creates quarterly estimated tax payment projections that can be easily customized for each client based on any one of a number of variables, including changes to a projected estimates' baseline. Updated schedules of projected payments for clients to meet their estimated payment obligations are also readily available.
- **Intuit Link:** Enjoy a cloud-hosted portal that gathers and manages clients' tax documents and data. With [Intuit Link](#), instead of chasing clients for information, you can send them an email link request. Set up automated email reminders every 7 days to log into the Link client portal and upload documents.
- **Electronic signature:** Intuit [eSignature](#) provides a quick and convenient way to request signatures. Rather than chasing down clients to sign in ink or using a third-party tool to request signatures, eSignature cuts to the chase to collect client signatures digitally and quickly.
- **Protection Plus:** With [Protection Plus](#), receive access to a dedicated team of experts who can handle tax notices and audits.

As a cloud-based professional tax software, ProConnect Tax modernizes your workflows by taking care of tedious, low-value tasks. Whether your firm has one user or 1,000 users, custom pricing options cover all firms with tax return bundles of every size. Call **844-534-2388** today to get started.

Conclusion

The best way to improve your firm and your team's job satisfaction is by removing low-value tasks from your workflow. Thanks to new technology and AI-powered tools, automating those tasks is incredibly simple. Many non-revenue generating jobs can also be outsourced, and other minutiae such as periodic client communications can be pre-written and pre-scheduled.

Optimizing your firm comes down to eliminating low-value work with technology and standardization. By taking those tasks off of senior-level tax accountants, you can decrease the chance that valuable team members leave your firm. Not only does decreasing low-value work save time and money; it improves the profession's talent pipeline. That's a win-win.

