



WHITE PAPER

Using technology to deliver efficiencies and elevate your tax clients' experience

Intuit Accountants



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Executive summary

Whether you're inheriting a legacy firm, starting your own firm, or working to make your firm more efficient, the journey to automation and modernization is exciting and challenging.

Multi-service tax and advisory firms face unique challenges finding technology solutions that are a fit for all employees. At the same time, clients have high expectations regarding data security, clarity of expectations for process and pricing, and ease of collaboration. When your firm is preparing hundreds to thousands of tax returns a year, it takes the right technology solutions and process efficiencies to meet your employees' and clients' needs.

Firms across the country are innovating and experimenting to find the right future-forward technological solutions for their growing firms. These solutions include moving to cloud-based operations, customized and automated outreach to clients, time-saving efficiencies that improve tax return accuracy, and creating bespoke bots to reduce monotonous work.



Are you ready to
bring your accounting
practice into the
future?

Key issues highlighted in this whitepaper

There's not enough time. Detailed data entry, repetitive manual processes, and high-touch client interactions can drain the hours from the day. With so much to do for each client engagement, productivity, efficiency, and a positive client experience seem out of reach.

Clients expect more value and clarity.

Tax savings, advisory services, and price transparency are just a few of the expectations clients set for tax professionals. The standards for service can feel too high for a mere human to achieve, given the number of tax returns your firm files.

The firm of the future doesn't use paper.

Many tax and advisory firms continue to rely on paper, leading to data entry errors and wasted time. You already know that printing, mailing, and storing paperwork is an outdated system that doesn't work for large, efficient, or remote-work firms.

Differences in employee knowledge and communication. The way each employee communicates with clients is unique, which detracts from a cohesive firm brand. It can also facilitate needless back-and-forth communications when clients don't understand what documents their tax professional must have.

Growing pains for acquisitions and legacy firms. Acquisitions and inheritance of legacy firms mean taking on employees who have vastly different technology experience. Some might never have e-filed a tax return, while others are diehard fans of a particular software solution—although there's never one they can all agree on.



The problem: Clients and employees expect a modern, efficient experience—and you need to use technology to deliver on-point solutions

When you're a firm with hundreds to thousands of tax returns to prep each year, client expectations and demands on employees seem to become higher. Here are some common demands facing CPAs, EAs, tax preparers, and consultants at tax and advisory firms.

There's not enough time

Creating an exceptional client experience is increasingly challenging for firms, given the time-intensive nature of tax returns. There are new client consultations, setting expectations, original documentation to gather, the back-and-forth time to solicit missing materials, and lengthy to-do lists to make sure each return is filed correctly.

The race against the clock—and burnout—is exacerbated by the current shortage of accountants. The profession has been grappling with declines in enrollment in accounting programs. The [AICPA 2023 Trends Report](#) noted a 36% drop from 2016 to 2022 in first-time candidates taking the CPA exam.

There's also a changing landscape, which requires accountants to be well versed in technology and data analysis. The learning curve can further stretch the already limited resources of many firms. Many tax and advisory firms are hard-pressed to deliver personalized, high-touch experiences, while balancing an increasing and evolving workload. It can feel like a high-quality client experience requires more personalized interactions—and who today has time for that?

Clients expect more value and clarity

Clients of tax professionals today expect more than preparation of their tax returns; they are looking for advisors who can guide them through the intricate landscape of financial planning and help them optimize their tax positions. A substantial 83% of taxpayers want a tax professional who can provide advisory services, not just file returns during tax season, according to the [Intuit Taxpayer Insights & Intelligence Brief](#). Clients are increasingly looking for professionals who can provide a holistic approach to their finances, adding substantial value.

"We see a widening gap in the profession between firms who lead with tax preparation and traditional compliance services, and those that lead with proactive tax planning and advisory services," said Barry Pennett, previously Senior Vice President and General Manager of the Intuit

ProTax Group, and now Chief Sales Officer at Intuit. “Firms that communicate the estimated tax savings from appropriate strategies are better able to help clients reach their short- and long-term financial goals, as well as monetize these services.”

And as many tax pros know, a little hand-holding is necessary with many clients, who aren't always comfortable with finance and the tax process. In fact, 72% of taxpayers in the Brief noted that they like having a list of documents they still need to submit. Creating crystal-clear expectations and getting them communicated to clients—all while finding time to actually work on the tax returns—is a common challenge among large tax firms.

The firm of the future doesn't use paper

Taxpayers today—and in the generations growing toward more mature, complex personal and professional finances—are digital natives. They bring their expectations for technology-based solutions to firms, according to the Brief.

More than half of taxpayers (52%) prefer the option of all-digital communication with their tax professional. The survey also revealed that 66% of taxpayers expect electronic signing, and 70% prefer uploading documents to a single, consolidated location. Yet many tax and advisory firms find themselves grappling with their reluctance to move toward technology, instead of holding tight to the legacy of paper.

The conventional processes of printing, mailing, and storing paperwork are particularly ill-suited to large or growing firms, where the volume of documents is overwhelming, or to firms that embrace remote work, where physical distance makes paper processes impractical. For these firms, modernizing with technological solutions isn't just a matter of staying competitive; it's about *survival*. The firm of the future is an entity that eschews paper in favor of digital processes.



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Modern firms must also address their clients' legitimate security concerns. Industry-standard security for tax documents and other personal information is the expectation 86% of taxpayers have for their tax professional. Another 73% of taxpayers want a secure place where they can upload documentation to their tax professional, and they want to be able to access it throughout the year.

These needs can put hosted solutions out of the running, although in some cases for larger, robust software programs, they may be a good option. Local servers and locally stored files often prove cumbersome, inefficient, and inaccessible. They're a burden—if not impossible to access—for remote employees.

The transition from pen and paper to tech solutions is not without its challenges. This requires a cultural shift, investment, and staff training. However, firms that overcome these hurdles will find themselves with a significant advantage. They're more efficient, more flexible, and better able to serve clients who live in a digital-first world.

Differences in employee knowledge and communication

Smooth and consistent employee-client interactions are important for maintaining the reputation and efficiency of tax and advisory firms. Individual differences in how employees communicate which documents they need, what the deadlines are, and where to send that information can result in a confusing client experience. If a client is unsure about the necessary documents required by their tax professional, it can lead to an inefficient and frustrating cycle of communication—for both parties.

A lack of guidance from tax professionals around their expectations for communication and templates for helpful, yet comprehensive client outreach can leave employees feeling unsupported. The steady flow of questions to their inboxes can also leave them feeling email-overwhelmed, leading to untimely responses to clients.

Repetitive emails like the ones to onboard and communicate tax prep needs, can take hours from the day. Ultimately, they slow operations and create negative experiences for clients if processes and next steps are unclear.

Clients' demand for helpful, proactive communication is evident, with 74% of taxpayers in the Brief expressing a preference for tax professionals to send automatic reminders about required documents and next steps. This sentiment underscores the need for firms to adopt technologies that facilitate clear communication and document management.

Growing pains for acquisitions and legacy firms

As firm owners reach retirement age, ambitious firms find opportunities to grow in buying up those small firms. The practice is made more simple, in some ways, by the prevalence of remote work and the popularity of firms with a presence across the nation. But as Travis Eaton, CPA, of **Fox Alliance** found, there can be critical pain points when trying to merge employees with different technology under one banner.

“The acquisition of various offices within a short span resulted in each location using different tax software and employing different processes for client document storage,” said Eaton. “The existence of various tax preparation software led to inefficiencies in staffing, data management, and pricing because we had to allocate resources to manage multiple software systems.” To make matters more complicated, the Mac versus PC battle was playing out among the firm’s employees, and some locations had on-premise servers that limited file access to those on-site.



The existence of various tax preparation software led to inefficiencies in staffing, data management, and pricing because we had to allocate resources to manage multiple software systems.

Travis Eaton, CPA, Fox Alliance

New practice owners revolutionizing their inherited legacy firms with technology over paper or old systems can meet equal resistance. The refrain “We’ve always done it this way” is a familiar tune for any organization facing change.

But change is inevitable, especially as firms future-proof with more efficient technological solutions. Finding a way to merge employees’ varied backgrounds and support them with training on easy-to-learn software is a must.



Solution requirements

1. There can't be a reliance on paper or solutions that require meeting in person.
2. Create consistency and efficiency among employees, ensuring clear client communications.
3. Save time by eliminating redundant, highly manual processes to ultimately save money or make more profit for the firm.
4. Ensure accuracy of tax returns, increase tax savings, and demonstrate the firm's knowledge and value to clients.
5. Be easy for employees to understand and use the software so they can facilitate a positive client experience.

Firm solutions: The right tools, automations, and bots

Cloud-based technology that aligns with expectations

You've heard it already—and you know it's time: Toss the paper, ditch the local server and hard copies of software. The future is in the cloud.

Cloud-enabled solutions, browser-based software, and digitally native apps are clients' basic expectation for interactions, from email communication and Zoom meetings, to document upload. The good news is that these solutions exist and have grown into software maturity.

Data from the Taxpayer Insights and Intelligence Brief underscores a critical reason why digital methods win for taxpayers: 72% report saving time by signing their tax documents electronically versus doing it in person with mailed signatures.

Dark Horse CPAs is a unique firm that focuses on equipping CPAs and accountants with the right tools to run their own practices under the Dark Horse banner. The principals of the firms are fully remote, located across the country, and complete all together about 4,000 tax returns a year. For Dark Horse's leadership, having a tax tool that was intuitive and accessible anywhere was non-negotiable.



"Our tax software, Intuit ProConnect Tax, has been another winner," said Max Fritz, CPA, COO and co-founder of Dark Horse. "Intuit keeps beefing up ProConnect Tax with new features, and having it in the cloud instead of stuck on a server has been a game-changer."

Being cloud-based means there's no hosting, no hardware, and no manual work to get the latest updates; the time savings is baked in. With a curated selection of easy-to-use tax tools, Dark Horse firms can spend more time on client work and less time on operational updates.

These kinds of digital platforms can coordinate that operational work for you, such as providing up-to-the-minute accurate information for clients about what's needed from them at every step in the tax process. This is where automation in technology becomes key.

Intuit Tax Council's favorite timesaving micro automations

"This one is easy ... Bookkeep for all e-commerce and other businesses using payment methods such as Stripe, PayPal, Square, and others." – Dawn Brolin, CPA, CFE, [Powerful Accounting LLC](#)

"We use Calendly for scheduling. Calendly saves the time of leaving messages and the back and forth of who's available when." – Diana Crawford, CPA, [Crawford, Merritt & Company](#)

"We teach our clients to use the 'Mark as Done' feature in Intuit Link. It seems so tiny, but it cuts down on so many 'Are you ready for us to begin working on your tax return' emails!" – Al-Nesha Jones, CPA, MBA, [ASE Group](#)

"We have been using RightTool for QuickBooks® Online and it has really improved our bookkeeping productivity by allowing us to be more efficient. The browser extension lets us navigate QuickBooks Online faster using a customized menu. It has made fixing accounting errors so much faster with their bulk delete feature." – [John D. Jordan, CPA PA](#)

"I signed up with Ignition last fall, and just recently Ignition has been added to Zapier, which was awesome because it made our onboarding process so much easier and faster." – Tatiana Tsoir, CPA, [Linza Advisors](#)

Practice management systems and automated processes

Accounting practice management software takes care of many of the day-to-day operations and organization for your firm—things like client management, project and workload management, and efficiency monitoring and improvement. It can create a centralized repository for client communication and give everyone clearer transparency into workflows.

The right practice management software can improve your clients' experience with your firm because they get accurate, on-time email communications. Clients ultimately get more valuable interactions with employees when they reach out, because the draining and monotonous outreach and reminders tasks have automatically been completed.

Research shows that firms using programs, systems, and processes for operational efficiency experience higher levels of success. Leader firms, as profiled by Karbon in its [Practice Excellence Report](#), outpace lagging firms in their use of tools, including workflow and client relationship management (CRM) systems by 120-130%. The gap widens even further when it comes to Business Intelligence (BI) tools, with leader firms using them 238% more than laggard firms.

Karbon itself is a popular practice management tool among firm owners.



“Karbon enables a collaborative place for firms to manage workflows, confidently scope work, automate data collection, scale client onboarding and communicate with teams,” said Jim Buffington, CPA, an advisory services leader with Intuit Accountants. “Karbon’s strength is email and inbox management.”



Other tools bring together processes that may have been done in fragmented ways that lacked consistency and cohesion. Ignition is a fan favorite proposal, invoicing, and payment collection program that Intuit Tax Council member Tatiana Tsoir, CPA, of Linza Advisors added to her client onboarding process. Tsoir used Ignition in combination with Basecamp, a project management system she uses internally, document exchange program TaxDome, and Zapier, which connects disparate apps with “if this, then that” logic. Here’s how Tsoir explains her Ignition “Zap:”

1. A new proposal is signed in Ignition. The team member gets a reminder to login and create all the tasks on the engagement letter (recurring tasks).
2. A new to-do thread is created in Basecamp, in Tax Prep to-do lists for the business.
3. A new to-do thread is created in Basecamp, in Tax Prep to-do lists for the individual main taxpayer.
4. Create a new main contact in TaxDome.
5. An email is sent to my client success manager with 10 steps to create other items manually.

Getting your tool stack narrowed down to your must-haves is an important step to avoid too much task-switching, and counterproductively, overwhelm from too much technology. Finding tools that are already partnered, integrated, or are comprehensive enough to include most of the features you need is ideal.



“The integration between ProConnect Tax and Ignition makes getting your client list into Ignition seamless,” said John D. Jordan, CPA PA, another member of the Intuit Tax Council. “Sending tax proposals with the engagement letters in bulk is a huge timesaver and a great way to collect all the clients’ payment information upon signing. We also send client requests in bulk from Intuit Link, which clients love. Using these two bulk features saves days of time compared to doing them individually, or a week compared to doing them on paper as we did years ago.”

Intuitive, streamlined solutions

For tax and advisory firms navigating the transformation from legacy systems to modern technologies, the adoption of intuitive software and streamlined tech solutions is critical.

Intuitive software can bridge the gap between varying levels of employee tech proficiency, easing the transition with its user-friendly interfaces and easier learning curves. Fox Alliance’s Eaton gave an example: “The layout and depiction of ProConnect Tax has always intuitively aligned with my understanding of how things flow into the return, which I find particularly valuable when preparing a return. Plus, as part of the Intuit ecosystem, it plays nicely with our clients’ books in QuickBooks Online, advisory capabilities in Intuit Tax Advisor, and other helpful Intuit feature integrations.”

Streamlined technology not only increases efficiency and accuracy, but also future proofs firms, making them more resilient to evolving market demands and regulatory changes.

“Technology has been a game-changer for us, but it’s a bit like navigating a tech jungle out there,” said Fritz of Dark Horse. “We’ve got to be smart about what we choose to integrate; otherwise, we end up with a mess we call ‘SaaS Soup,’ and that’s no good for anyone.”

The right solutions streamline and simplify processes, ultimately saving their users time, money, and mental energy. By investing in training and supportive technology, firms can harmonize the old with the new to create a dynamic work environment. These kinds of solutions can, themselves, support more sophisticated client experiences. They can also free up the capacity to make each client interaction more meaningful just by reducing daily stresses and frustrations.



“When I’m using an integrated tool, I’m just streamlining things,” said Al-Nesha Jones, CPA, MBA at ASE Group. “I’m reducing the chance for error, reducing data entry, and reducing our time.”

Look for easy-to-navigate tools that can automate all parts of the firm. These include engagement letters, invoicing, meeting coordination, document collection and storage, client communication, tax return completion, form submission, and payment collection.

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Overall, our firm’s commitment to leveraging technology has not only streamlined our internal processes but also positioned us to deliver enhanced services and value to our clients in a rapidly evolving landscape.

– **Matt Fritz**, CPA, Dark Horse CPAs



Artificial intelligence and smart software

With five out of six taxpayers (according to the Brief) expecting their tax professional to deliver tax strategies that result in improved financial outcomes, here's the great news for firms focused on increasing revenue and profitability: 79% of taxpayers are willing to pay more for tax strategy work if it might result in improved financial outcomes, like reduced tax liability and savings.

This shift in client expectations from traditional tax preparation to a more comprehensive financial advisory role is encouraging to tax professionals who are eager to expand into advisory services. Firms that embrace this change in perspective to integrate tax planning with business intelligence tools and workflow automation are likely to see not only increased client satisfaction, but financial growth and enhanced firm loyalty as well.

The best part? Clients don't expect tax professionals to provide strategy simply by drawing on their expertise, unaided. The Brief found that 83% of clients expect their tax professionals to use the best tools to provide advice. This is where AI, and other smart software and features can come into play, such as Intuit Tax Advisor. These kinds of technologies can analyze data and extrapolate outcomes based on algorithms, helping tax pros make decisions through analytical guidance.

How have updates to your technology helped your clients?

- Better work experience
- Less frustrations
- It meets them where they are

How has it helped your employees?

- Demonstrates growth
- More value

–Irfan Dossani, CPA, [Whitley Penn](#)



Smart software features and integrations can handle the number crunching, allowing CPAs to bring the human element to strategic advisory services. These features save time in the advisory process, ultimately opening the door to a high-value service with less time invested. The rates firms charge for tax planning and advisory services, on average, are five times more than tax preparation fees, according to the [Tax Planning and Advisory Insights Survey](#).

Adopting advisory services also strengthens the client-professional relationship. It transcends the once-a-year interaction to become a continuous dialogue. A tax professional becomes a trusted advisor, helping clients navigate financial decisions and plan for life events.

In fact, 82% of accountants say technology is creating more meaningful client interactions, according to the 2023 [QuickBooks Accounting Tech Forward Survey](#). It's a testament to the way technology is transforming accountants' relationships with their clients. The stronger relationship further amplifies the likelihood of repeat customers and word-of-mouth referrals, expanding the firm's reach and success.

Automations and bots

Technology today thrives in rote, repeatable tasks, and for firms, these are the often time-consuming, low-value work and administrative tasks. Dark Horse CPAs has leaned into out-of-the-box software solutions with automations as well as custom robotic process automation (RPA) to maximize the firm's efficiency. Fritz describes four ways his tech team works within a program called UI Path to create a "little digital helper" that tackles repetitive tasks:

1. We've deployed a bot that generates summary emails for completed individual returns. This eliminates the need for manual drafting, and ensures accuracy and consistency in communication with clients. On average, this has cut down the time needed to explain a completed tax return to a client from 30 minutes to 5 minutes.
2. Another bot in our arsenal automatically prints returns from our tax software and saves them in the client portal and our document management system (DMS). This streamlined approach reduces manual intervention and enhances document management efficiency.
3. We're currently in the development phase of a bot tasked with automating new client setup. Once operational, this bot will handle the setup process across various systems, including our workflow management software, tax software, billing software, client portal, and DMS. By centralizing and automating this process, we ensure accuracy and consistency in client onboarding, significantly reducing the margin for error and administrative overhead associated with manual setup procedures.
4. Overall, leveraging bots for process automation has proven instrumental in enhancing efficiency, minimizing errors, and optimizing resource allocation across our firm.

Dark Horse CPAs is far from the only firm to find efficiencies through tech. According to the [QuickBooks Accountant Technology Survey](#), 31% of accountants who use technology solutions reported that they're better organized, 28% do less manual work, and 27% have fewer errors. Early technology adopters say innovative tech is helping drive their businesses forward, with 91% saying that technology has helped them support their clients' evolving needs, the same survey found.



“There has been a reinvestment of the time saved into investing in client work or new initiatives,” said Irfan Dossani, CPA, head of Whitley Penn’s client accounting and advisory services team. “It’s a function of becoming efficient and figuring out ways to minimize steps in the workflow.”

Many firms are seeing the benefits of time savings and reinvestment of time into revenue-generating work. The #1 benefit of technology is that it’s helping boost revenue due to efficiency gains, 41% of accountants reported in the QuickBooks survey. More than a third of accountants (36%) say it’s increasing income streams.

For some firms, having the extra help from automations and bots is helping them move from hourly billing to value billing. Most advisory firms still use an hourly billing model, while only about a quarter use value billing, the Tax Planning and Advisory Insights Survey found. Dark Horse is one of the firms that has made the shift to value billing, due in no small part to its technology solutions.

“By predominantly charging fixed fees for our services, clients appreciate the transparency and predictability of their accounting bills,” Fritz said. “Without leveraging technology to streamline our processes and gain efficiencies, we’d inevitably need more billable hours for each project, ultimately passing those fees on to our clients.”

The automations and technology-enabled time savings create the ability to help clients. Fritz praised their impact on the firm, too.

“Our team members can devote more time to providing value-added services to our clients, resulting in a mutually beneficial relationship for all parties involved.”

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We firmly believe that embracing these advancements and leveraging them to offer higher-value services, such as advisory, is key to remaining relevant in the evolving landscape.

– **Matt Fritz**, CPA, Dark Horse CPAs

IN THEIR WORDS



How Fox Alliance found efficiency through technology

Written by Travis Eaton, CPA, MPA, Tax Partner at Fox Alliance

For several years, **Fox Alliance** has used Intuit **ProConnect Tax** as our primary tax software solution for the thousands of clients we serve each tax year.

Prior to our shift to ProConnect, our firm relied on various desktop software solutions that served us adequately. However, they fell short of fulfilling our broader expectations that we felt could be leveraged from a comprehensive tax software solution. The majority of our tax professionals primarily operate using laptops, and have adapted to **working remotely** for a substantial part of the year. This setup emphasizes the need for software that's capable of handling our firm's needs, but also flexible, enabling accessibility regardless of the location or the office. We needed a software solution that could keep up with us, providing the power to manage our tasks effectively—and, at the same time, adapt to the ever-evolving demands of our remote work setup. ProConnect Tax, with its native-cloud functionalities, has been a step in the right direction.

Scaling for growth

With our primary offices in Austin and San Antonio, we have 15 on staff, which can vary depending on the time of the year. Our range of tax services include preparing personal, partnership, and corporate returns, as well as estate, trust, and gift tax returns. While we serve a diverse client base, our focus revolves around individuals and small businesses. We handle an array of state and business returns, typically involving multiple partners and shareholders. In addition to tax prep, we offer comprehensive bookkeeping, payroll, advisory services, and tax planning solutions.

We encountered numerous challenges when it came to streamlining software across multiple offices, including the following:

- The acquisition of various offices within a short span resulted in each location using different tax software and employing different processes for client document storage.
- Legacy servers in each office limited file access to their respective locations.
- We had a combination of Macs and PCs, so there was often a compatibility issue across different locations and users.
- The existence of various tax preparation software led to inefficiencies in staffing, data management, and pricing, because we had to allocate resources to manage multiple software systems.

We experimented with various software and hosting solutions to try and get every office and staff on the same software so that we could better manage the multiple offices. At one point, I was using a PC for one office, a Mac computer for another, and a hosted solution on my PC, just to have access to everything.

“Hosted solutions” were not the answer for our firm

Remote connectivity proved to be a major obstacle with hosted solutions. Frequently, we would encounter delays connecting to the desktop software. The software would often require updates at inconvenient times, or there would be a cumbersome installation and access process for every new user. Some of these solutions could take up to 5-10 minutes to login and connect each time, which quickly accumulates over a tax season when you’re prepping multiple returns. Updates that could take up to one hour to fully install were often required, preventing returns from being filed—and then everything had to be restarted to implement the changes. These issues not only slowed down our workflow, but also resulted in frustrating situations where team members would be unable to access or work on tax returns for hours at a time, due to technical issues.

Whether using a hosted solution or connecting to a local server, we frequently encountered a cumbersome process to locate locally stored files, often navigating through multiple steps, such as making copies of the files and opening them within the program. One specific software exacerbated this issue by necessitating the manual repetition of these steps for each return in the subsequent season. Furthermore, it enforced a requirement for users to log out of the file successfully before allowing access to a different user, rather than enabling simultaneous access. In addition, all the desktop solutions we had required manual saving, posing a risk of work loss. This issue was particularly detrimental when working through a hosted environment prone to frequent connection losses.

Obtaining timely assistance proved to be another source of frustration when it came to customer support. We often had to call a support number, endure lengthy hold times, and hope to find someone capable of understanding and addressing our concerns. There would also be different support lines for hosting issues vs. actual software issues, further creating additional down time. The programs were notably slow in implementing feedback and changes. We would frequently reach out to the developers to suggest improvements for the software, but rarely received a response, let alone any actual changes. The programs remained stagnant in terms of development updates.

Along with efficiency, our old process was not very cost effective—some software offered a limited number of states free of charge, while charging per state for additional ones. Given our diverse clientele across multiple states, the seemingly reasonable pricing per return could quickly increase to two or three times the initial estimated cost. It would be difficult to gauge what our costs would be until the tax season was over.

Choosing ProConnect Tax

We eventually reached a breaking point and were determined to find a solution that offered a seamless experience with 24/7 access. The primary driver behind our decision to go with ProConnect Tax was the desire for a hassle-free experience, as well as the following reasons:

- We wanted a solution that eliminated the need for constant updates and concerns about file synchronization among team members.
- We wanted something that would allow us to view the status of all returns across multiple offices and allow us to resource accordingly.
- Consolidating our systems into the cloud offered the promise of improved operational and user efficiencies, which we hoped would outweigh any potential increase in cost per return.
- While cost was a legitimate concern, we recognized that our current solutions were causing significant inefficiencies. We were willing to take a chance and embrace the pricing structure of cloud-native software.
- The opportunity to maximize our time during tax season and eliminate the burden of managing a hosted solution or dealing with limitations became our top priority.

By transitioning to cloud-native software, we aimed to achieve a seamless and worry-free tax prep process that allowed our team to focus on providing a high-quality service. We wanted a solution that would allow us to focus on our core tasks without the added complexities and distractions of technical issues. With our sights set on maximizing efficiency and productivity, we were optimistic that the cloud-based software could provide the best solution.

Transition and learning

While there is always a transition period when setting up with a new software, we found the transition to be relatively straightforward. ProConnect Tax had an individual solely dedicated to helping us transition all of our client files from other tax software. We had several thousand files to migrate; the result was a seamless integration into ProConnect Tax.

While learning a new software can often take some time to adjust, especially as a whole firm, we were surprised how quickly Fox Alliance was able to adapt to ProConnect Tax. Our team immediately found the accessibility and interface to be a huge plus. As a Mac user, I could have a specific tax return pulled up within 15 seconds after logging into my computer. While the layout of the data input can look different from other software, our team found it easy to navigate and very user friendly.

It was refreshing to experience a software that didn't feel as if you were working on something that hadn't been updated in 10+ years. During the demanding hours of tax season, it's important to me to work with a product that isn't monotonous or uninspiring. I realize that each tax pro has their own unique approach and preferences in preparing a return or viewing displayed items. However, the layout and depiction of ProConnect Tax has always intuitively aligned with my understanding of how things flow into the return, which I find particularly valuable when preparing a return.

Tax advisory is now possible

As a firm, we focus on planning and advisory services, and for the past few years, we used various third-party software, but the biggest constraint with all of them was getting the client information into the software. This would either involve manually entering return information, or using a scanning tool that would leave out plenty of information and still require a review and further entry. While still in the early stages, Intuit Accountants has implemented **Intuit Tax Advisor**, a new planning tool that is now included with ProConnect Tax. Our team can quickly build out a tax plan using the information already populated from the tax return, rather than having to re-enter everything in another software. The tool itself has come a long way in the level of strategies in just the time it's been available.

The Intuit ecosystem is a plus

Customer support is a crucial aspect of any tax software, so the availability of helpful, efficient support can greatly impact the user experience. With ProConnect Tax, we found the customer chat feature to be particularly beneficial. Instead of enduring lengthy hold times on the phone, we could

simply initiate a chat and connect to a support specialist who could assist us while accessing the return in real time. This allowed for quicker resolution, along with the extended hours and weekend support during busy times.

Another added benefit has been the integration with [QuickBooks Online](#) to automatically populate a client's books into the ProConnect Tax return. While we do not currently map all of our clients, the Books to Tax Feature saves a lot of time for simpler business returns with clean books. In fact, we can often prepare a business return in just a few minutes once the mapping is set up properly in the initial year.

While ProConnect Tax has improved efficiencies in numerous ways, we have identified a few limitations with the software. However, the development team has been receptive to our feedback and made efforts to address these issues, leading to noticeable improvements each year—something we hadn't experienced with prior software. For example, we encountered difficulties with returns being edited after they were filed, because there was no easy way to lock the return and prevent further modifications. However, Intuit has since taken our feedback into consideration and implemented a locking feature with the most recent tax season. They also provided the option to restrict access, depending on the team member's access level.

One of the main constraints we faced was the lack of a convenient method for mass e-filing, particularly for extensions. This was time-consuming and cumbersome to individually select and process thousands of returns for extension or e-filing. However, an update to allow for batch extension filing is now available, which we plan to test very soon.

In addition, we work with many businesses that have multiple partners or shareholders, and had to manually print each individual K1—a time-consuming process. ProConnect has since introduced partner and shareholder packages that allow for the easy separation of K1s for each specific member, streamlining this process.

Ease and access are key to our success

The transition to cloud-native tax software has brought significant improvements to our firm's operational efficiency and user experience. The accessibility, interface, and user-friendly nature of ProConnect Tax streamlined our workflows and reduced the frustrations associated with outdated desktop software. We have valued the ease in which we can access the software, regardless of a team members' location, the ongoing improvements that are being continually made, and the ecosystem's integrations with accounting and planning software. With ProConnect Tax, we have cloud-native solution that enhances our firm's productivity.

Conclusion

Bringing your practice into the future means leaning into the capabilities that today's software solutions offer to streamline workflows, enable efficiencies, and provide a higher-quality client experience.

These solutions include moving to cloud-based operations, customized and automated outreach to clients, time-saving efficiencies that improve tax return accuracy, and creation of bespoke bots to reduce monotonous work.

Intuit ProConnect Tax is one solution for firms looking to increase efficiencies, and provide clients with the top-of-the-line experience they expect. Deliver trusted, high-quality services to clients while improving employee experiences for more efficiency, productivity, and profit.

Whether your firm needs one user or one hundred, custom pricing options cover all firms with tax return bundles of every size. Call **844-818-5406** today to get started.

In G2's Spring 2024 Reports, ProConnect Tax once again took top honors in multiple categories.



Please visit the [ProConnect Tax product page](#) for more information.

Intuit ProConnect Tax key features, explained

Cloud-based professional tax software with secure data storage

Operate in the cloud, untethered from hardware and offices. Data is stored on Intuit servers, so it's accessible anytime from anywhere. Information is stored on firewall-protected, redundant servers. ProConnect Tax securely stores all the client documents, data, tax forms, and signatures. Intuit's cloud service keeps your firm's data safe with enhanced security measures, protection services, and encryption. This isn't just a convenient way to save on costs and storage space in person or on your own hosting service; it's meeting a basic customer expectation for the safety of their data.



QuickBooks Online integration

As an Intuit product, ProConnect Tax seamlessly integrates with QuickBooks Online and QuickBooks Online Accountant—the go-to software when working with a business owner's books.

Intuit Tax Advisor

Intuit Tax Advisor is an integrated advisory tool that automatically generates strategies for client tax savings, so tax professionals can go full circle from tax prep to tax planning, and is now part of ProConnect Tax. Create custom tax plans in minutes to show clients valuable savings by using tax strategies automatically generated from their ProConnect Tax returns.

Ignition

The strategic partnership between Ignition and Intuit brings together the capabilities of Intuit ProConnect Tax, QuickBooks Online, and Ignition to transform client engagement and payment collection. This collaboration streamlines the process by enabling the bulk sending of tax engagements, automates payment processes to efficiently manage and eliminate accounts receivable, and seamlessly connects various workflows.

Intuit Link

ProConnect Tax includes Intuit Link, a cloud-hosted portal that gathers and manages clients' tax documents and data. Tax preparers can flag missing data, estimates, and fields needing review within ProConnect Tax. Instead of typing emails manually to notify clients of flags, your firm can send templated letters with preset and customized tax return data fields. Flagged items can be reviewed by clients and accounting professionals.

FACT 95% of ProConnect Tax users reported saving an average of 39 minutes per tax return when using Intuit Link*

Data Import Capability

The Data Input drawer allows users to import documents and review the information to be imported against the source document. Input drawer also houses imported documents, autofills tax document fields, and marks them for review.

FACT 97% of ProConnect Tax Online users reported saving an average of 30 minutes per tax return when using Data Import Capability*

eSignature

When it's time to have clients sign contracts and tax documents, 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 quickly.

FACT 93% of ProConnect Tax Online users reported saving an average of 34 minutes per tax return when using eSignature*

Protection Plus

The same Tax Pro survey found that 78% of taxpayers would choose a tax professional who offers tax audit protection over one that doesn't. Protection Plus is a low-cost option to add on to any ProConnect Tax returns that your firm files. In effect, Protection Plus expands your team to include CPAs and EAs who can work with your team to handle any notices, issues with IRS forms, and audits. They take care of the long phone calls with state or federal agencies to fully resolve any flagged issues.

**Based on a survey of Tax Pros who used ProConnect Tax Online to complete client TY2022 returns and reported time savings using Intuit Link, Data Import Capability, or eSignature. Survey compiled 10/2023-01/2024. User experience may vary.*

Intuit products

[Intuit ProConnect Tax](#)

[ProConnect Tax Integrations](#)

[Intuit Tax Advisor](#)

[Intuit Link](#)

[eSignature](#)

[Protection Plus](#)

[Pay-by-Refund](#)

[Tax Organizer](#)

[QuickBooks Online Accountant](#)