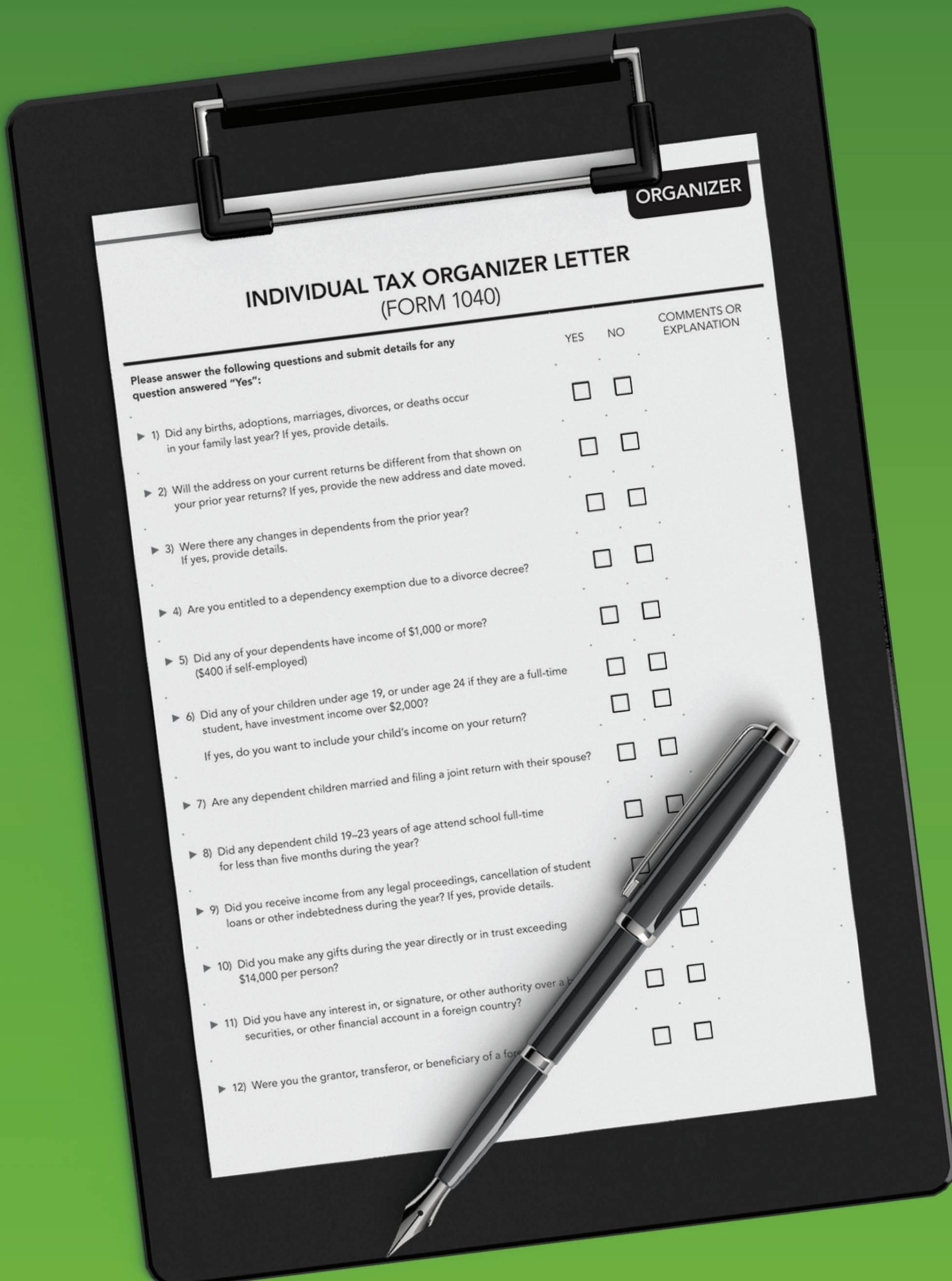
THE TAX INTERVIEW HAS CHANGED

Interact with your clients digitally



Times have changed but the value of your time has not. Finding new ways to be more efficient is essential to stay ahead. Every interaction with your clients must be streamlined and simple. Explore WorkSpace™ Online to build the firm of the future.

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Automating Tax Office Management

Today, more than ever, many firms are trying to find a differentiator, an edge, a unique brand that elevates them over their competition. A new set of automated processes can be just the thing to set a firm apart, since simply offering tax return processing doesn't present firms as being unique. Instead, tax firms seeking an advantage are automating their office management with new technology that presents their clients with a unique brand experience.

Some newly developed tax office software automations provided in practice management software include online scheduling, portal connections, lobby kiosk check-in systems, and online invoicing. Such automations have been available in dental and medical offices for some time, and are only now beginning to show up in tax firms. These new online systems aid in satisfying a generation of new clients who demand to use the latest technology. This generation requires the use of mobile devices to interact through online portals to value their experience when dealing with their taxes. The tax office that embraces this generation and these new automations will see an increase in efficiency, revenue, and its bottom line. In addition, firms will see a reduction in costs and errors.

Online Appointment Systems

Tax office management teams manually book a high volume of appointments during tax season. Today, it is much more efficient to replace the standard manual appointment management systems with more client-friendly technology. Practice management software with online scheduling features allows clients to request an appointment based upon a tax professional's availability, which can be accepted or declined by an administrator. This simple and quick interaction creates an incredible experience that displays your elevated brand of service. Once the appointment is accepted, the client will receive automated reminders via text, email, or phone. Clients will appreciate the ease with which they can interact with firms, causing this automation to become a powerful differentiator.

Online Interview Questionnaire

If your office is still handing out a form on a clipboard on which clients must complete information and answer tax-related questions, it is time to evaluate how you engage your clients. Tax programs are now providing options where clients can email or use a portal to update their information.

When we automate our offices, we elevate the impression we leave with a client or prospect. Wouldn't it be useful to reduce admin time and increase your brand impact? You can. There are many options, one of the newest is to conduct online interviews and in-office questionnaires digitally. These systems allow your client to take just a few moments to complete basic tax questions or new client questions on a computer or tablet. Once this process has been completed, the document can be routed to the professional electronically to review before or during the inter-

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view. This automates the interview process and saves professional time. You now have the ability to do more interviews, complete more returns, or simply get home earlier.

Lobby Kiosk Check-in Systems

Introducing a kiosk or iPad system in the tax office lobby, instead of handing out clipboards or questionnaires during the tax interview, is a unique branding opportunity. It will certainly get your client's attention. This kind of automated tax office management will allow clients to easily check-in for their appointment, update contact information, and answer important tax questions, all from the comfort of your lobby. What a stark contrast to filing out a paper survey with a pencil or going through a series of questionnaires. Your team will appreciate not having to key in updated information into your practice management software, and your client will appreciate the streamlined process of getting his or her taxes done.

Check-in systems can alert anyone on your team that a client has arrived and whether the client's contact information has changed since he or she was last seen. If integrated well, these changes can also update other systems throughout the year, such as tax, GL and email, simplifying your admin team's job.

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Portal Connections

Using portals is a must for the modern automated tax office trying to make a digital connection with its clients. Whether your client is sending you additional source documents, reviewing a return, or being reminded of an estimate due, they will experience your firm's efficient service. Providing a portal is thoughtful because clients no longer want to commute back and forth for another visit to the tax office to pick up their tax return or drop off information. In addition, they know that this information is too sensitive to just send through the post office or in an email. Portals are also a great time saver for both parties when clients live far from the office or have moved out of state.

Security is a highly important feature of portals. Once clients have been notified that work that has been completed, they can be prompted to pay their bills with the same protection as tax returns or financials. 1040Bridge is a company that provides products that are at the forefront of this technology. This is great for those once a year clients who struggle to pay on time. No more AR, and no more waiting for payment!

Portals can have a positive effect on your firm's tax workflow as well. Think of connecting tax processing to document management systems so that no additional steps are needed when processing returns. The good news is that this portal interaction doesn't replace the personal tax interview, but complements it with digital connections while providing a desired edge over other firms in the industry.

Onscreen Reviewing

Taking the review process onto a screen can be one of the most difficult steps in the continuation of the paperless journey. Reviewing source documents, marking up tax returns, and sifting through large complicated returns is nearly impossible without the right technology. Forward-thinking firms now have three or four monitors as a part of their arsenal. Allowing for office functions and email on one, a couple of years of tax returns on another, and either source documents or other applications on yet another. You will find a markup tool is required, but there are many to choose from. Adobe offers built-in abilities but can take some training and work to use. TicTie Calculate and SurePrep offer incredible tools that are a little easier to use and have been designed specifically for the accounting and tax professional.

Online Invoicing and Payments

Printing and mailing invoices is antiquated and can be costly, not only in terms of printing and mailing costs, but in admin time as well. With new automated tax office management, billing becomes simplified and invoices can either be emailed or sent to an online client portal. In some cases, PDF return files can be locked down, preventing a client from downloading or reviewing them until the tax return invoice is paid. This kind of automation streamlines your workflow and reduces administration time in managing client billings and AR. It is not difficult to implement and this particular change helps firms to provide exceptional service.

Embracing New Technology

Taking advantage of these automations will provide many benefits to the firm and clients—but, most importantly, they will bring your firm a step closer to a new era of technology. Automated tax office management can streamline processes, transform the firm image, and improve the client experience. This can all be done at a substantial savings to the firm, because implementing new technology actually improves productivity and efficiencies. The real cost of new software and hardware is offset by this savings. In some cases, ROI is accomplished in the first six to twelve months. This evidence of exceptional service contributes to the process of creating a unique firm brand. It's truly a win-win situation for the tax office. As a result, automated tax office management can become the catalyst for the developing a unique brand that makes your firm stand out from the competition.

OfficeTools WorkSpace ONLINE

AUTOMATING TAX OFFICE MANAGEMENT

REVOLUTIONARY FEATURES PROVIDING FORWARD THINKING FIRMS A UNIQUE EDGE TO COMPETE IN TODAY'S MARKET.

Automated Tax Interview
This automated questionnaire is completed online and will appear in the professional appointment calendar as an integrated PDF. The results are ready for review either during your interview or simply online for your mail-in clients.

Appointment Request System
Clients can request appointments whether for regular services or just once a year at tax season. Appointments can be approved and your team notified automatically.

Kiosk Check in System
Brand your firm as forward thinking with a kiosk or iPad in your lobby to confirm your clients arrival, update information and even complete a questionnaire. Clients experience a secure way without pencil or paper.

Automated Appointment Reminders
All online appointments will automatically remind your client of the upcoming appointment so no appointment will be forgotten and missed.

Send Confidential Data
Building on the principles of keeping confidential information confidential, we use the industry's most secure methods to transfer documents effortlessly. Any file type, large or small, send it now.

Invoices and Payments
Send your client's invoices through the admin panel or through Practice Management. Clients can easily pay without leaving your branded portal, increasing customer confidence.

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