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Software

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Kristy Short • Sep. 12, 2014



Darrell Layman made a bold move this year, and at the riskiest time: tax season. With a broad vision to significantly increase workflow efficiency across his firm, [Darrell Layman](#), CPA, he transitioned from a desktop document management system to the cloud.

“I had two goals in mind,” Layman reflected. “I wanted anytime-anywhere access for

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to test a new integration between solutions—delivering integrated document management plus a client portal for securely sharing tax returns with clients directly from his tax software.

“I found out about the integration because I sit on an Accountants Council, which is an advisory board run by Intuit. It was the integration I had been waiting for, so I agreed to be a beta tester. I transitioned about 80 clients during tax season to the new online process. It was very successful; the entire tax preparation process was so much more efficient.”

Layman approached the transition from desktop to the cloud very thoughtfully. As one of the first beta testers for the integration, he worked with a small sub-set of his client base and also collaborated with the SmartVault team periodically during tax season to ensure a successful process. And, it was successful...very successful. In fact, things progressed so smoothly that Layman is currently in the process of transitioning his entire client base to the cloud.

Layman explained how easy it is to work with today's cloud technologies, emphasizing ease of implementation. “Technology today is made for self-starters and DIY-ers. What I further love about SmartVault is that it offers staff they call Customer Heroes who work exclusively with accountants to make sure we get the most out of our transition to the cloud. I could not have been more impressed with this team. They were so helpful during the entire transition. They really listen to their clients and address needs quickly,” Layman said.

A Winning Season

Layman's initial goal when he made the transition was to improve efficiency with the tax workflow...and that's exactly what happened.

“The idea was to develop a streamlined process. Working with our desktop

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- Client source documents are scanned in, indexed, and then uploaded to the tax software.
- Data is seamlessly imported into the tax return.
- After review, a copy of the final tax return is printed to SmartVault and automatically routed into the client's folder in their secure portal.

“We literally just hit the Print button to deliver the tax return in the client portal. It's so much more efficient than the old way,” stated Layman.

Layman's new cloud solution also offers automated email alerts to further enhance workflow processes.

“The new mail merge capability allowed us to send customizable batch email notifications to clients, alerting them that their returns were available in their portals. This shaved even more time off of our process.”

In addition to the system's native email alerts from the client portal, it also offers an integrated plug-in for Microsoft Outlook, making it quick and simple to send secure links from inside Outlook.

With the combined boost in workflow efficiency and the convenience of working within a digital tax workflow, Layman was able to quantify the time savings he experienced during tax season.

“In terms of the technology investment, we now save about \$3,000 a year. It's much more cost-effective to use a subscription-based service. In terms of reduction in staff hours based on increased workflow efficiency, I estimate that we've saved an additional \$7,000 per year,” Layman explained.

With about \$10,000 in annual savings, Layman has already realized an impressive

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and payment features in the portal...that way clients could sign Form 9979 and pay their invoice online for a completely electronic process. Adding these features would be huge.”

Layman indicated that he has already had discussions with key people at SmartVault regarding these features. “I’m not sure when this might happen, but I’m confident that it will.”

The grand vision, according to Darrell Layman, is to continue the transition until a completely end-to-end paperless work environment is achieved. Thanks to this new integration, he is closer than ever to making his paperless dreams a reality.

“It’s the future of the profession,” Layman stated confidently. “All digital is where firms should be. It’s certainly where I want to be...and not only with the tax workflow, but across all areas of my business.”

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