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Isaac M. O'Bannon • Jul. 22, 2015

A Q&A with Ran Oelgiesser, CMO of online engagement technology provider [vCita](#).

Over 13 percent of Americans, or roughly 41.4 million people, filed their taxes during the week of April 15, 2015 – with another 12 percent missing the deadline. That equates to about 80 million people who waited until the last minute to complete their taxes.

1. What advantages does technology offer CPAs during tax season, and throughout the year in general?

By utilizing technology for proactive engagement throughout the year, and especially early on the tax season, CPAs can improve client preparation and retention and minimize that last minute scramble in April.

Online engagement technology that integrates directly into a CPA's website can assist and automate many of the back-office tasks and coordination that can often consume a small CPA's valuable time and resources.

2. What are the top 3 features a CPA can introduce to their website to eliminate the hardships of tax season?

The top 3 features a CPA can introduce to their website to eliminate the hardship of tax season are:

Online Scheduling & Appointment Reminders: With these tools CPAs can offer self-

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scheduling will save many hours of coordination time, reduce no-shows, and ensure each CPA meets as many clients as possible during the tax season.

Online Document Sharing: By creating a portal on their website where clients can share documents prior to their meeting it eliminates the wasted time associated with them doing it in-person at the CPAs offices. This technology also allows a CPA to better prepare for the meeting with the client.

Online Payments and Invoicing: Accepting credit card payments online saves time for both the client and the CPA. The client can pay at their convenience once their taxes are done, and the CPA office does not need to spend precious time on taking payments over the phone – or worse calling customers to remind them of the outstanding balance. Taking it one step further, CPAs can use an online invoicing solution that alerts the client of outstanding invoices, allowing clients to review invoices and remit payment in a click.

3. How can transitioning to digital processes for business critical tasks during this time of the year pay off for CPAs? (Decreased time managing client appointments, streamlined document management, better client communication leading to less missed appointments during tax season, etc.)

Allowing clients to upload files and/or complete forms prior to a meeting holds a lot of ROI potential for document-heavy services like CPAs. The timesaving aspect alone is huge benefit, but this also allows the accountant to gain more in-depth insights into a client before an upcoming meeting, streamlining the process as well as putting the CPA in position to offer the best advice possible for each client.

Likewise, adding an online scheduling option now, will save phone tag and hours of coordination toward tax season, and will save time on reminders, cancellations and

reschedule during the tax season. On top of that the client experience will lead to a

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Make sure your mobile site has the right tools that maximize the chance those potential clients will become clients.

On the other side, for existing clients, provide a mobile-friendly interface for them to schedule, pay and communicate with you. Many customers would prefer a quick text-based communication on their phone vs. needing to call your office. Finally use SMS text messages for reminders and critical messages. Today, SMS text messages have an open rate of 98 percent within the first 10 minutes. But for that exact reason, make sure you do not turn text messages into a general marketing channel, as this is unlikely to be perceived well by most clients.

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