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Chris Salisbury knows tech, and as a CPA, he knows accounting and taxes. But what really sets his firm apart is how he has combined the best tech with best practices to realize better client service and higher profits. After working for more than a decade at large regional firms in North Carolina, Chris and his partner Will Smith grew

frustrated with the outdated and inflexible workflow model that most traditional

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and started moving to CCH Axcess, the cloud-based solution from Wolters Kluwer around 2010. Chris says this has been a critical element of their ability to grow the practice and increase profitability, while decreasing overhead and improving client service. Since then, Smith & Salisbury has grown to a staff of eight, serving nearly 800 clients across all entity types, with most clients having multiple filing requirements. For 2018, the firm realized revenues of about $1.7 million and filed more than 1,200 returns and extensions during the 2019 tax season.

[Read the 5-Star review of CCH Axcess.]

"We initially hosted the tax and accounting system, CCH ProSystem *fx*, on our own server, so that we would have greater remote capabilities while still having the professional suite of solutions from CCH," Chris said. "We then made the move to CCH Axcess, the completely cloud-based system, and use almost the entire suite of modules that are available on that platform." CCH Axcess includes modules for tax, document management, client portals, practice management, workflow management, financials, data analysis, and predictive analytics. Smith & Salisbury also uses CCH ProSystem *fx* Scan and Autoflow, which along with automated scheduling, and the other modules from Wolters Kluwer has greatly streamlined their tax season. "Firms need to be fairly quick to adapt new technologies in order to stay competitive, and CCH Axcess gives us the ability to serve clients more efficiently."

In October 2018, the firm continued its evolution by moving to a value-based fixed price model. As part of this transition, all clients signed fixed pricing agreements for the services the firm would provide, and all clients are required to pay for those services in advance. The result, he says, is no more chasing down payments or collections – imagine zero AR and no time tracking. The project management and workflow modules from CCH Axcess were essential to the success of their transition.

The mobile capabilities of CCH Axcess, combined with the fixed pricing model, are

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the office, and helps us reduce the monotony and headaches of the tedious aspects of paper shuffling."

Learn how CCH Axcess can help your firm achieve greater productivity and profitability at: https://EngageTax.WoltersKluwer.com/Axcess

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