

How This 10-Person Firm Operates Like a 25- Person Practice with Superior Client Service

Smart tool consolidation that delivers 42% same-day response rates and enterprise-level efficiency for 1,000+ clients

The client response has been overwhelmingly positive.

John Siebert, Firm Owner,
Siebert & Associates, CPAs



John Siebert

From client frustration to 5-star reviews: how Siebert & Associates, CPAs elevated satisfaction for 1,000+ clients



Beyond better operational efficiency

A practice management solution that made clients feel:

✓ Confident and in control

a seamless, tech-driven experience increased engagement, even among older, tech-averse clients

✓ Inspired and empowered

a faster, easier way to submit information resulted in docs sent 1-2 months earlier

✓ Heard and engaged

42% responded within 24 hours to an information request

✓ Satisfied and well-served

up to 90% time saved delivering electronic tax returns, accelerating service turnaround

✓ Supported and secure

5+ tools replaced by one all-in-one, client-friendly platform

- Explore how Siebert & Associates, CPAs elevated its client experience and set the stage for increased success
- Benchmark your firm's client experience with our quiz: [Are you delivering a top client experience?](#)

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About Siebert & Associates, CPAs

Siebert & Associates, CPAs is an Ohio-based firm with a team of 10 providing financial management solutions to more than 1,000 clients, specializing in serving doctors, dentists, and veterinarians.

25%

productivity growth
(vs. 11% industry)

Columbus,
OH

Location

10

Staff

1,000+

Clients



John Siebert,
CPA and Firm Owner



Hope Siebert,
Office Manager

Full-service
accounting,
bookkeeping,
cash flow
management,
tax planning

Services

42%

same-day billing
response rate

For accounting firms, a poor client experience isn't just a client problem; it's a firm problem, making work harder, slower, and more stressful than it needs to be.

That's what John and Hope Siebert faced as a result of an **unusable client portal and confusing, disconnected tools, which frustrated clients.**

The frustration wasn't just felt by clients. For the team, everything took longer, required more manual intervention, and made it harder to do what they do best: deliver great service.

John and Hope knew change was needed. They switched to a new practice management solution with one goal in mind: making life easier for their clients and their team.

Today, their clients feel happier, understood, and valued. John and Hope also feel more confident in how their firm runs, delivering a professional, modern service that has elevated client satisfaction and set the stage for continued success.

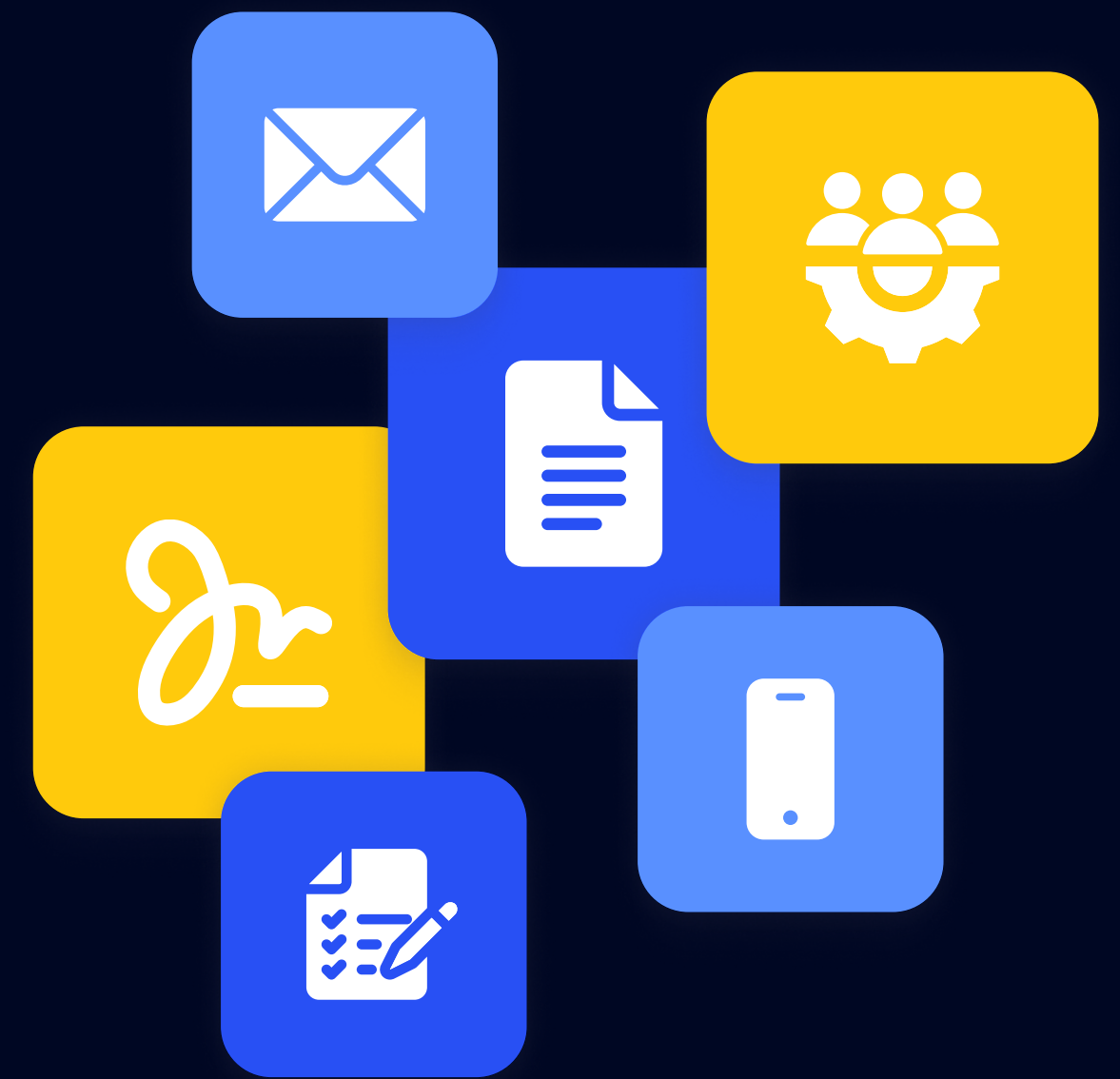
Explore John and Hope's story of how they turned client frustration into five-star loyalty.

The scaling challenge: when tool sprawl kills productivity and client satisfaction

As Siebert & Associates grew to serve 1,000+ clients, their collection of disconnected tools created operational bottlenecks that consumed valuable staff time.

“We were pretty much 100% a Thomson Reuters shop – Practice CS for project and client management, and NetClient CS for our online client portal. FileCabinet CS for static storage, Workpapers for our in-process work.” – John Siebert

Adding to the list of tools were PandaDoc for e-signatures, BizPayo for electronic payments, and UltraTax for tax returns.



I found Practice [CS] to be incredibly cumbersome to use for workflow management.

John Siebert,
Firm Owner, Siebert & Associates, CPAs

While John mentioned that this tech stack “worked”, managing disconnected tools created scaling inefficiencies that hindered productivity – **not just for their team, but their clients as well.**

For simple tasks, like uploading documents, e-signing, and paying, clients had to follow different links and log into separate tools. These workflow complexities slowed productivity and **made clients feel frustrated.**



It was all of these different systems, and I had to work really hard to keep clients organized. Clients were like, “Well, why isn’t it all in the same place?”

Hope Siebert,
Office Manager, Siebert & Associates, CPAs

The trigger point: portals that clients hated

An even bigger issue for Siebert & Associates, CPAs was their previous portals — because clients hated them.

Instead of offering a unified hub that simplified all client touchpoints, their portal delivered a poor user experience that made basic tasks — even logging in — so difficult that clients would give up out of frustration.



The client portals through Thompson were a nightmare — clients hated it. Trying to get clients to buy into using the Thompson portals was difficult.

John Siebert,
Firm Owner, Siebert & Associates, CPAs

“It was very much a one-way street. We would put work product out for the client, but it was almost impossible for the client to upload data to us. It was very cumbersome and not user-intuitive at all.”
— John Siebert

Due to this, John and Hope kept a **backup portal, but even that required extra steps to upload docs and notify the client on how to access them.** **“We had a backup because Thomas Reuters was awful. Clients were able to log in, but I was talking them through [the portal] multiple times a day... They didn’t know what to do.”** — Hope Siebert



Clients would get frustrated and stop trying. They had a very difficult time logging in and uploading stuff... I spent a lot of time handholding.

Hope Siebert,
Office Manager, Siebert & Associates, CPAs

As a result of the unusable portals, many of their clients resorted to coming into the office to pick up their returns, **adding inconvenience and making the process feel harder than it needed to be.**

The hidden cost of client friction

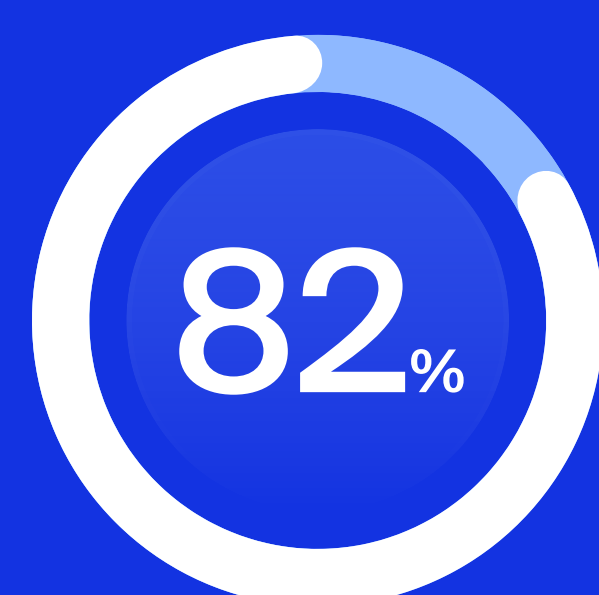
A poor client experience does more than frustrate your clients — it affects **how clients perceive your firm.**

When communication breaks down, trust erodes, satisfaction drops, and retention declines. In a competitive industry like accounting, **even small client frustrations can drive clients away and cause lasting damage to your reputation.**

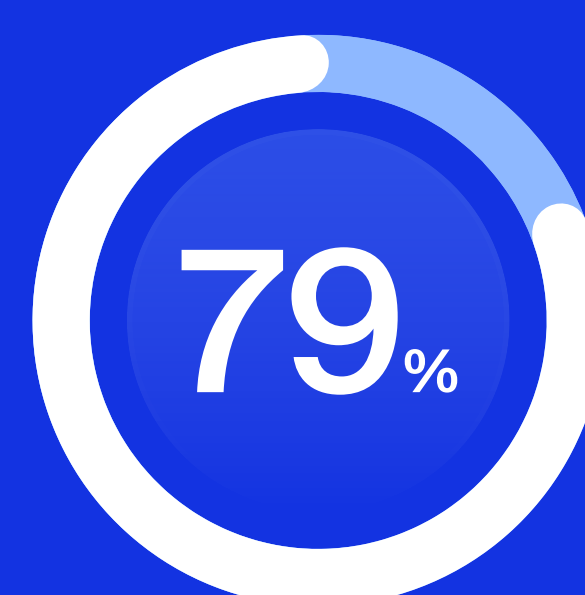
What your clients want you to know

Are your clients unresponsive, even after countless follow-ups? They're probably just as frustrated as you are.

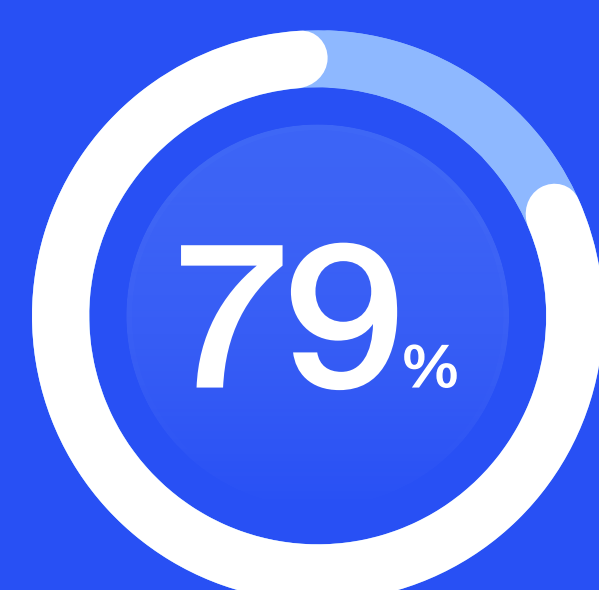
By offering a frictionless client experience that engages — not frustrates — your clients, you can streamline client interactions, reduce headaches, and save time for both them and your team.



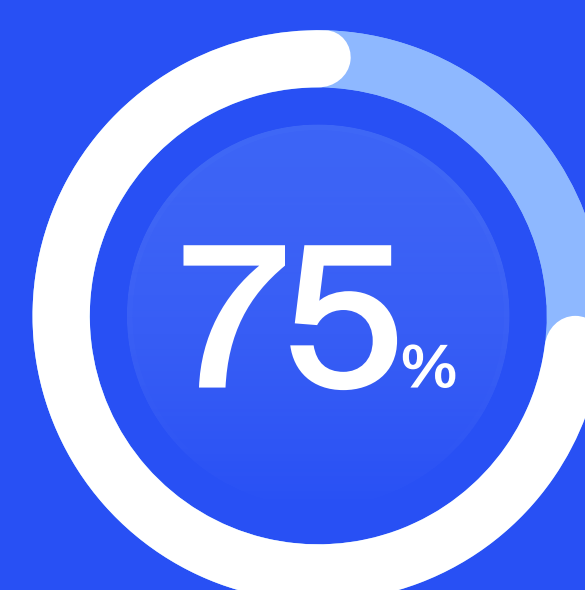
of clients want to see a clear order of steps to be followed



of clients desire easy-to-use digital tools or software



of clients agree that using a portal for document sharing, signatures, payments, and messaging with their accountant is efficient



of clients are willing to spend up to four hours providing information if the experience is seamless

From TaxDome's report, **2024 Client Satisfaction: What Taxpayers Expect from Their Accountants** — 1,000 taxpayers surveyed.



Discovering a better way: a platform built for connection

John and Hope were ready for change — and in 2022, at an industry event in Nashville where John met with fellow members of the American Institute of Certified Tax Professionals, he came across TaxDome.

“TaxDome was one of the vendors that presented. I was floored.” — John Siebert

During the 90-minute presentation, John saw how TaxDome’s all-in-one practice management platform offered modern, client-facing features built into every part of the workflow.

But it wasn’t just the innovative technology that intrigued John; it was the potential for a **smarter, more efficient way to work — an easier experience not only for his team, but for their clients.**



I was excited by the potential I saw from TaxDome’s presentation, and what we could accomplish if we became more efficient using the modern client interface and technology.

John Siebert,
Firm Owner, Siebert & Associates, CPAs

Migrating software isn’t an easy decision, especially for larger firms like Siebert & Associates, CPAs. But John and Hope made the switch with one conviction: TaxDome was the solution they needed to give their clients a better service.

“I knew we had issues with what we were doing. I wasn't happy with what we were using... A change had to be made in a way that was going to enhance what my clients were seeing. We weren’t just going to make a change to make a change. It had to be an improvement.” — Hope Siebert

Within a few months, the team was fully up and running in TaxDome — and **clients started noticing the difference.**

The 1st breakthrough: from 6 tools to 1 unified client experience

Siebert & Associates, CPAs took control of their client experience by replacing their cumbersome, scattered tech stack with an all-in-one firm-client solution.

With everything in one place, it simplified every touchpoint for their clients, **eliminating the confusion and frustration they felt before.**



Six previously scattered client processes, now centralized:

- ✓✓ Uploading and accessing documents
- ✓✓ E-signing documents
- ✓✓ Filling in intake forms
- ✓✓ Paying online
- ✓✓ Accessing their tax returns
- ✓✓ Communicating with the firm (via emails, secure chats, and SMS)

Now, their clients no longer have to click different email links, navigate multiple tools, remember different logins, or guess where things are. **The client experience is clearer and more intuitive, making every interaction with John and Hope's team feel effortless, seamless, and more secure – boosting client confidence.**



With everything organized and in one spot, we look competent and successful. We look good to our clients. We look like we're worth what we're charging.

Hope Siebert,
Office Manager, Siebert & Associates, CPAs

Another benefit of centralizing and connecting their workflows: **Hope reduced time spent delivering electronic tax returns by up to 90% – accelerating service turnaround for their clients:**

"It would take me 20 minutes, sometimes more, to set all that up in our old system. Now it's 2 minutes – 5 minutes for a more complex one. It's fantastic."

The 2nd breakthrough: automated workflows that drive 42% same-day responses

Not only did their clients appreciate the centralized experience John and Hope provided them, but they also loved using the user-friendly tools.

One impactful feature was TaxDome's interactive organizer forms, which clients found so intuitive, enjoyable, and easy to use that a higher volume of them responded, and faster. In just 24 hours, 50 out of 120 clients — a 42% response rate — responded to a single information request:

“Yesterday I sent requests to 120 people to put in their ACH information — and they're doing it! I got 50 people who have already responded, which just blows my mind how quickly they're actually responding. That's the game-changer part.” — Hope Siebert



The buy-in that we now have from clients completing organizers is exponentially larger than when we were using the static tax organizers from Thompson.

John Siebert,
Firm Owner, Siebert & Associates, CPAs

John and Hope's clients no longer have issues submitting information — they receive a clear, easy-to-complete form right in their portal, ready to complete at their own pace. It's a seamless, enjoyable experience that also lets clients know their time is valued.

The team no longer has to wait months to hear from clients, and their clients get their tax returns faster — eliminating stress and boosting fulfillment on both sides.



It's stunning. We're getting documents delivered to us from clients a month earlier, if not a couple months earlier than before.

John Siebert,
Firm Owner, Siebert & Associates, CPAs

The 3rd breakthrough: mobile-first efficiency that even tech-averse clients embrace

An even bigger transformation Siebert & Associates, CPAs saw was the sheer number of their clients who embraced TaxDome's client mobile app, which elevated the firm's professionalism and increased client confidence and trust.



Clients being able to do this on their phones was a game-changer. It's amazing the number of clients who love the mobile app.

John Siebert,
Firm Owner, Siebert & Associates, CPAs

Using the app, clients can message directly, scan and upload documents, e-sign, pay securely, and more. It offers a modern, user-friendly experience that empowers clients to complete their tasks quickly and easily, right from their phones.

Even John and Hope's older, tech-averse clients — who previously avoided email — started using the app with confidence.



We have an older dentist who is now retired. Just a couple years ago, he wouldn't even try email or the [NetClient CS] portal. We actually had to drive up there and drop off paper documents for him, pick up his documents.

He moved to Florida about the year we started using TaxDome, and he figured it out. Could not believe it! He was uploading documents, sending chats. The man only had a cell phone and he figured out how to do all of this. That blows me away.

Hope Siebert,
Office Manager, Siebert & Associates, CPAs

The 3rd breakthrough: mobile-first efficiency that even tech-averse clients embrace

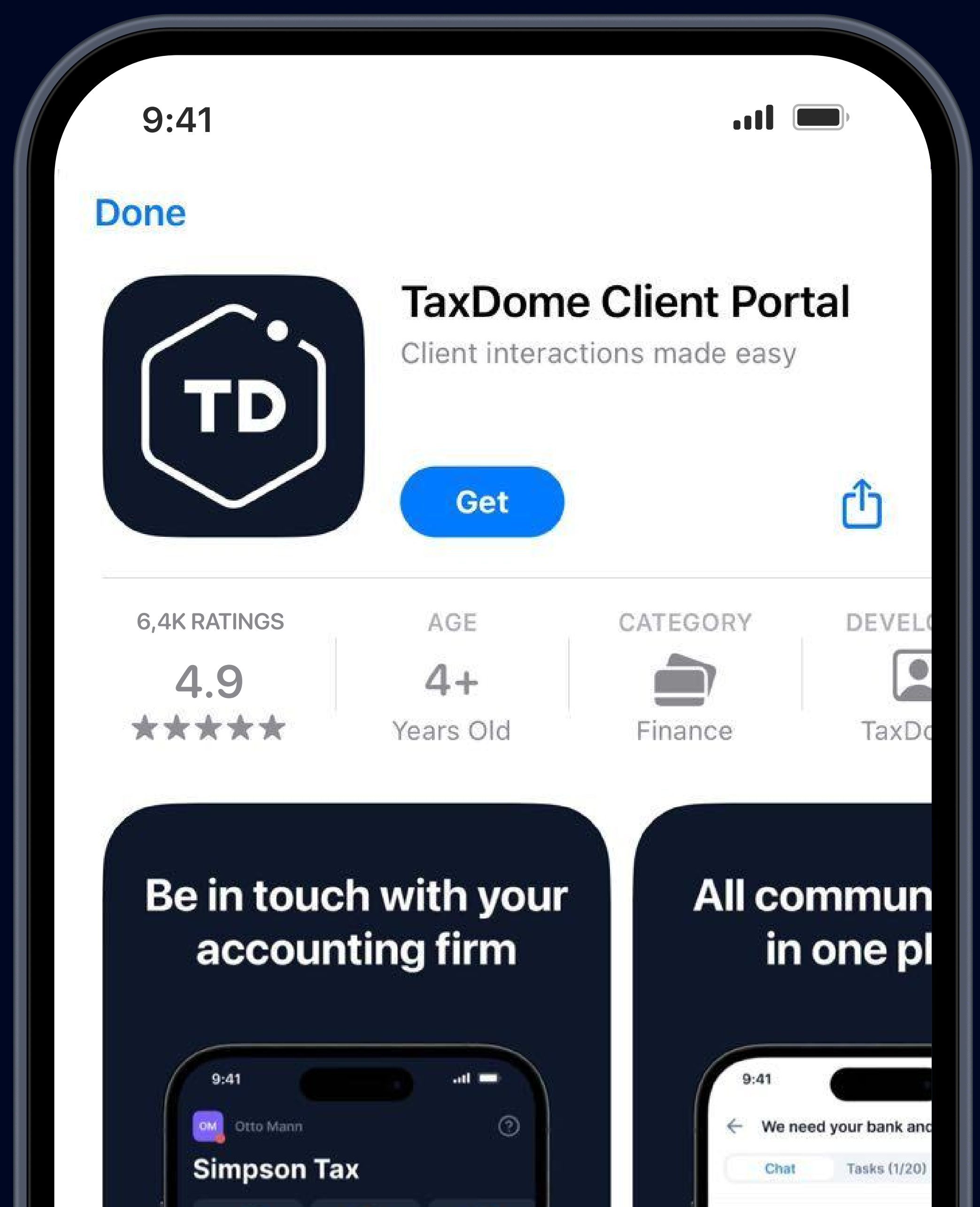
One of the many app features their clients loved was the built-in document scanner, which makes it easy for them to snap a clear picture of their documents, ready to upload.



Clearly, the clients love that feature because we see that a lot. Nobody has a scanner anymore; they all have smartphones. Clients take a picture of a document and send it to us directly. That's great.

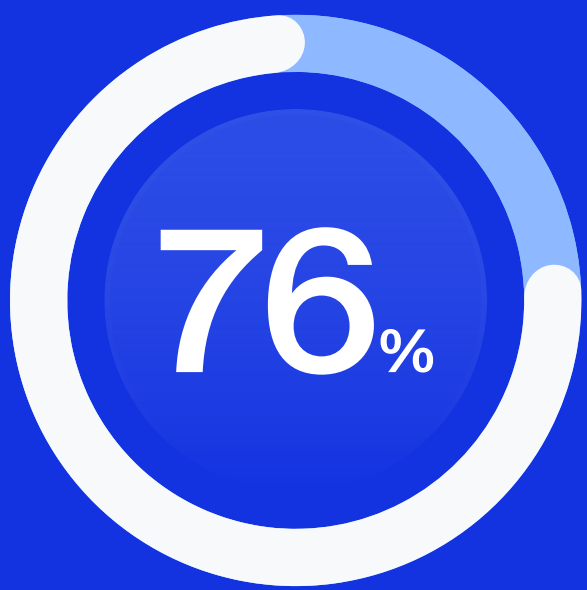
Hope Siebert,
Office Manager, Siebert & Associates, CPAs

By providing a seamless, mobile-first client experience, John and Hope's clients now **feel supported, confident, and in control**. It's even made work easier for the team: **"It's a relief. It's so much smoother when clients know what they're doing and they just do it."**
— Hope Siebert



Why the client experience matters

When your firm offers easy-to-use, modern tools, **clients are more likely to stay, return, and refer.** According to **1,000 clients** surveyed in our 2024 Client Satisfaction Report:



say they'd prefer using a secure portal for communication and document exchange



say it's very important that tasks they are asked to complete are provided digitally

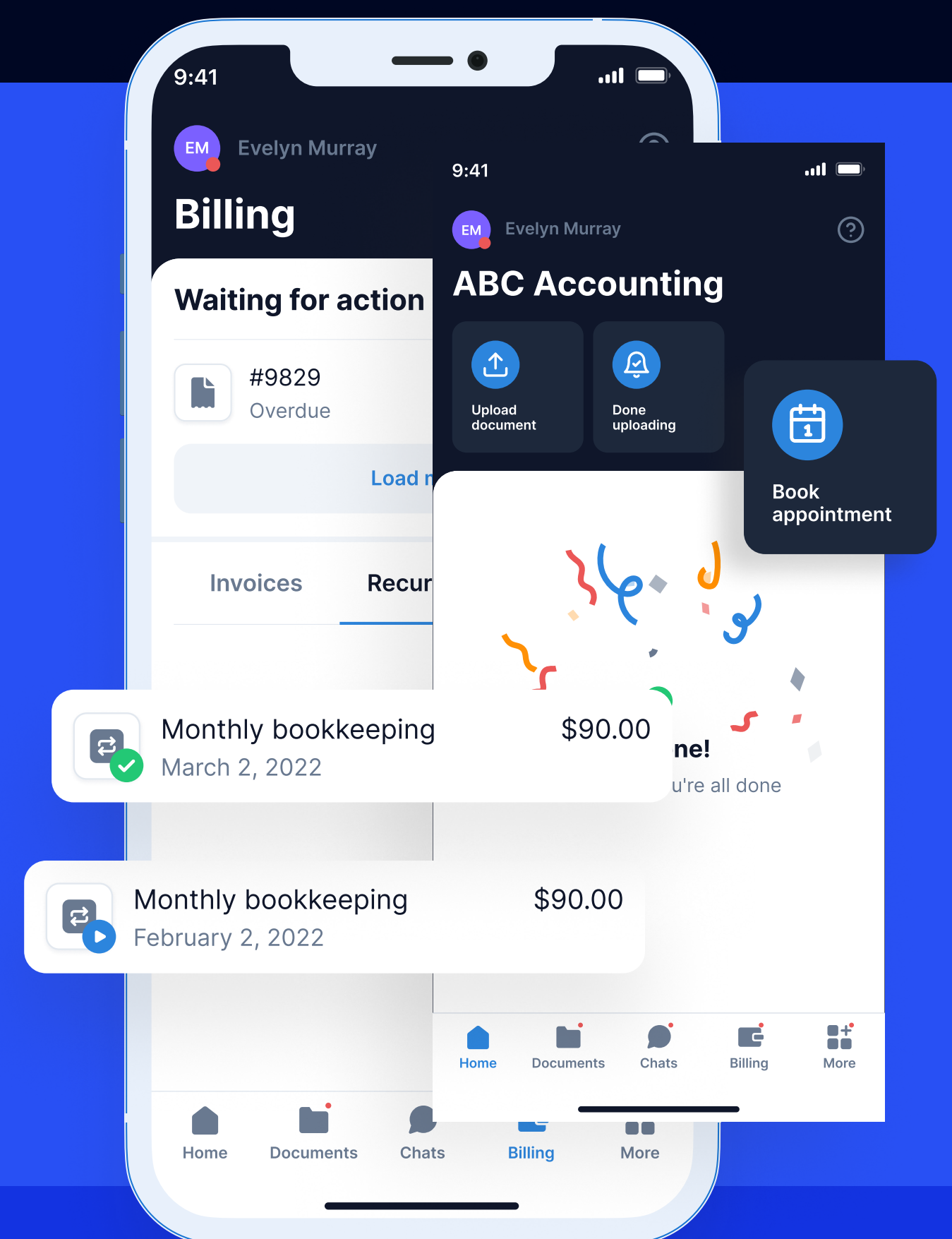
It's why TaxDome's complete practice management solution is designed to enhance the client experience as much as the firm experience. Because when your clients are happy, everything else — more clients, revenue, and growth — follows.



Why the client experience matters

The proof is in our client mobile app, **rated 4.9/5** on App Store and Google Play across **22,000+ client** reviews.

Being the first and most popular client portal app of its kind, the app has also peaked at **#72 on the App Store's Top 100 Finance apps**.



We're here to support your clients — without the extra workload

In line with our focus on helping you deliver an outstanding client experience, **TaxDome Client Care** gives your clients direct access to expert support from our team — right from their client portal.

Whether your clients need help uploading documents, e-signing, or navigating the dashboard, we've got them covered, so you can focus on the work while we handle the "How do I...?"

It's a seamless experience for them, and more time back for you.



Deliver the experience your clients expect

[Book a demo](#)

The payoff: stronger relationships, positive client feedback



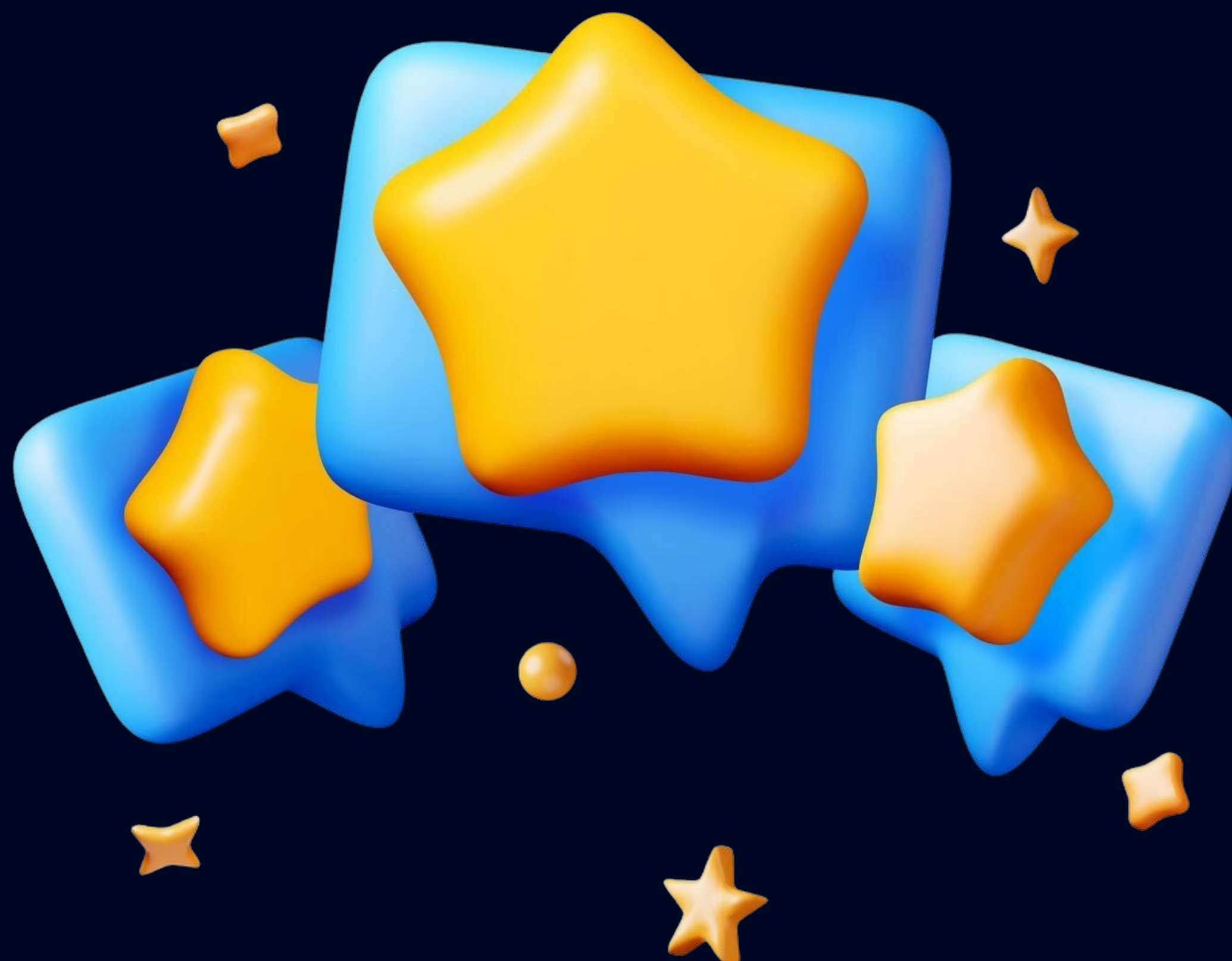
The buy-in from the client base, the response from the clients, has been overwhelmingly positive.

John Siebert,
Firm Owner, Siebert & Associates, CPAs

Since implementing TaxDome, Siebert & Associates, CPAs has seen a dramatic shift in their clients' self-sufficiency, which has **strengthened client relationships**.

"I'm not getting bogged down in client meetings because they're able to upload things without coming in. They're able to download their returns. They have no problem with the portal. We have a very close relationship even though we're hundreds, thousands of miles away." — John Siebert

As a result, the firm has received an influx of **positive client feedback, bolstering their online reputation**. **"It's just so much quicker, so much easier. We've got reviews on Google saying, 'Hey, this portal is fantastic, thank you for changing.' It exceeded my expectations."** — Hope Siebert



The payoff: stronger relationships, positive client feedback

★★★★★ 2 years ago

Siebert & Associates has been an important help to us in navigating taxes for our LLC and approaching retirement. Always friendly, good technology for document uploading and exchange, and great follow through in dealing with government taxing entities when necessary. Their professional approach and personal attention yields a higher confidence level than trying to navigate the tax landscape with a chain firm or computer program. Well worth it!

★★★★★ 11 months ago

Siebert and Associates, CPA's are great personal and business CPA's. I've worked with many CPA firms, E&Y, KPMG, and Regionals such as Meaden and Moore, and John Siebert is the absolute best. He has the technology to make filing taxes easy, he has a great team that can get answers, and he answers his phone if he is available. I've worked with John and the Siebert team for nearly 20 years and plan on continuing to work with them for many more. I highly recommend Siebert & Associates, CPAs

With superior service and 5-star client feedback, the firm's client experience has now become an asset, allowing them to charge more.



We had a fee increase this year. And part of that is, 'Hey, look how good we are.' TaxDome is making us look more professional and organized.

John Siebert,
Firm Owner, Siebert & Associates, CPAs

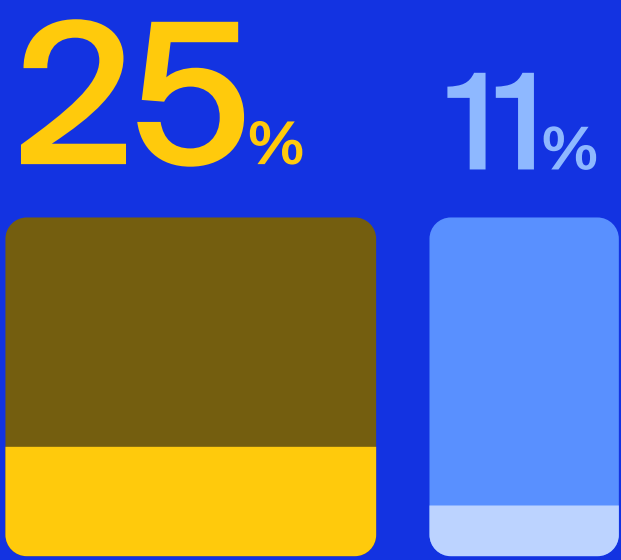
A new era: moving forward with clarity and confidence

By improving their client experience, Siebert & Associates, CPAs has also seen a significant increase in operational efficiency and time savings.

Looking back on their 2025 tax season, John and Hope realized:



95% of partnership returns and 90% of S-Corp returns filed by April 15



A 25% increase in productivity vs. 11% industry average

>30%

30% fewer hours worked compared to 5 years ago (John)

6+

scattered tools replaced with 1 unified platform

42%

same-day ACH setup completion (zero staff follow-up)

A new era: moving forward with clarity and confidence

More importantly, the team now feels **more focused, productive, and fulfilled** in their work, which has also freed up their time and improved their quality of life.



We aren't working 80-hour weeks anymore. Tax season is now manageable.

John Siebert,
Firm Owner, Siebert & Associates, CPAs

With firm efficiency and client satisfaction at an all-time high, TaxDome is now mission-critical to John and Hope's operations, helping them to lead their firm forward with clarity, control, and confidence.

"It's not hyperbole that everybody here lives in TaxDome — it is that integral to what we're doing."
— John Siebert

Siebert & Associates, CPAs isn't just running better; they're building a better future **for themselves and their clients.**



I have referred a number of people to TaxDome. It's a real easy sell for me because, you know, guys, this is a game-changer. You need to look at this.

Hope Siebert,
Office Manager, Siebert & Associates, CPAs

Are you delivering a **top client experience?**

Tax, bookkeeping, and accounting firms are gaining a competitive edge by delivering **an experience that today's clients want and expect**. Take our quick quiz to see how your firm stacks up. Choose the most suitable answer for each question and total your score at the end.

1. Can clients complete every task (forms, uploads, signatures) digitally, without confusion?

- ☐ 1 – Tasks are mostly manual, requiring emails, printing, and back-and-forth.
- ☐ 2 – Some tasks are digital; the process is scattered and can be unclear.
- ☐ 3 – Every task is fully digital, quick, and easy for clients to complete.

2. Do you offer an easy-to-use client portal?

- ☐ 1 – No client portal.
- ☐ 2 – Portal is available, but some clients find it difficult or confusing.
- ☐ 3 – Portal is simple, intuitive, and user-friendly for all clients.

3. Is your portal secured with multi-factor authentication (MFA) and SOC 2 certification?

- ☐ 1 – Basic passwords only, no additional protection.
- ☐ 2 – Some parts have MFA or security measures.
- ☐ 3 – MFA and SOC 2-level security are standard for all clients.

4. Do you provide clients with real-time status updates without them having to ask?

- ☐ 1 – Clients often reach out to request updates.
- ☐ 2 – Some updates are provided, but not consistently.
- ☐ 3 – Clients automatically receive real-time status notifications.

5. Does all client communication and document exchange happen on one platform?

- ☐ 1 – Multiple tools are used; clients juggle different logins.
- ☐ 2 – Mostly on one platform, but some exceptions require other tools.
- ☐ 3 – Everything is managed through a single, unified platform.

Are you delivering a top client experience?

6. How quickly does your firm respond to client questions or requests?

- ☐ 1 – Usually takes more than 48 hours.
- ☐ 2 – Typically within 24-48 hours.
- ☐ 3 – Always within 24 hours.

7. Can clients complete key tasks (pay, sign, upload, message) seamlessly from a mobile device?

- ☐ 1 – Tasks are difficult to complete on mobile, or mobile access is not supported.
- ☐ 2 – Portal offers mobile access, but not all tasks are fully supported.
- ☐ 3 – Fully mobile-friendly experience with a dedicated app.

8. Is your client onboarding process quick, easy, and sets clear expectations early?

- ☐ 1 – Onboarding often feels disorganized or overwhelming for clients.
- ☐ 2 – Some onboarding steps are clear, others are confusing for clients.
- ☐ 3 – Onboarding is fast, self-guided, and sets clear expectations.

9. Does your platform enhance (not hinder) your client experience?

- ☐ 1 – It often creates complexity or frustration for clients.
- ☐ 2 – Some tools and features help, others get in the way.
- ☐ 3 – The platform fully supports a seamless, client-first experience.

10. Do your clients say they feel secure, informed, supported, and happy?

- ☐ 1 – Rarely receive positive client feedback.
- ☐ 2 – Occasionally receive positive feedback.
- ☐ 3 – Consistently hear positive feedback and see it reflected in reviews.

How did your firm score?

28–30
points

You're delivering a world-class client experience. Your clients likely rave about your service and refer you often.

16–27
points

You're on the right track — refining a few areas can help turn good service into exceptional service.

15
points or fewer

Your client experience needs work. A better platform can get you there faster than you think.



Achieve a perfect 30/30 score with TaxDome

Book a free demo

Unlock your full potential with TaxDome, the operating system for your practice

From a secure, top-rated client mobile app to real-time, automated communication encompassing onboarding to billing, TaxDome empowers you with tools to deliver the **seamless, tech-driven service clients now expect.**

With our award-winning, all-in-one practice management platform, you can **eliminate friction, elevate satisfaction, and build stronger client relationships** — all while reclaiming time to focus on delivering more value and growing your firm.

Trusted by **30,000+** tax, bookkeeping, and accounting professionals — and **4M+** of their clients — in **25+** countries

Winner of **7 practice management categories** in the 2025 CPA Practice Advisor Readers' Choice Awards



Rated **4.7/5** across **6,200+** reviews on Capterra, G2, and GetApp