

**How TaxDome
helped a 40-person
accounting firm
become more
efficient and
scalable**

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Introducing Accurant LLC

Accurant LLC provides accounting, bookkeeping and tax preparation services for small and medium-sized businesses in Minnesota, Iowa and South Dakota. Founded in 2014, the firm currently has six offices in three states, employs more than 40 people, and serves more than 9,000 clients.

In late 2021, Accurant acquired two new firms. It soon became apparent that it needed to establish more streamlined and scalable processes to meet the demands of its growing client base and dispersed team. This prompted the firm to switch to TaxDome in November 2021 — just in time for tax season.

We spoke to managing partner Barb Vanags to find out how TaxDome has helped Accurant improve communication, boost efficiency, simplify processes and enhance its client experience — all while saving the firm money.



Barb Vanags

Finance & HR for Accurant,
LLC CFO for Leadferno



FOUNDED:

2014



STAFF:

40



CLIENT BASE:

9,000+



STARTED
USING TAXDOME:

November 2021



LOCATION:

Minnesota, Iowa, South Dakota



SERVICES PROVIDED:

Accounting, bookkeeping and tax
preparation services

The challenge

So why exactly did Accurant switch to TaxDome? When the firm acquired two new accounting businesses, it was the perfect time to look at their existing systems and processes and see how they could be improved.

Barb Vanags identified three major bottlenecks:

1. Scattered communication

With its workforce spread across five offices in three states and a large proportion of its staff working remotely, Accurant's team struggled to communicate effectively. Not only did this hamper everyday accounting processes, but it also made it difficult to share knowledge and experience across the team.

We have so many tax professionals who share wisdom back and forth, but because we are in several different locations, it's trying.

Did you know? Poor communication is estimated to account for a loss of nearly 7.5 hours — or roughly one working day — per employee per week.

With TaxDome, accounting firms have a single source of truth for all client data, communication, tasks and documents, ensuring that everyone in your team is always informed and in the loop.

**7.5
HOURS**

2. Inefficient processes

Accurant was relying heavily on legacy technology and processes, involving a lot of manual data entry that was highly inefficient and prone to human error. And as any accountant will know, even the smallest mistakes can lead to big issues.

Before TaxDome, we had Excel spreadsheets to track client statuses. It involved buckets of manual work. We had a lot of errors every tax season.

Did you know? Almost half (44%) of large accounting teams spend at least 25% of their time on repetitive manual tasks.

TaxDome's workflow automation saves accounting practices up to 40 hours per employee per month. For a 40-person firm like Accurant, that's 1,600 hours per month saved.

25%
OF TIME SPENT ON
MANUAL TASKS

40+
HOURS SAVED
PER MONTH

1,600
HOURS SAVED
PER MONTH

3. Ineffective tech

Accurant's tech stack included multiple software platforms. The team used Thomas Reuters' UltraTax for tax preparation, document management, and as a client portal. They also used Excel for manual data tracking, and HelloSign (now Dropbox Sign) for e-signatures.

Having so many separate tools to juggle made processes needlessly complicated. The team had to jump between different apps to perform simple workflows. And with multiple software licenses, the tech stack was also providing poor value for the money – especially since some of the legacy systems were proving less and less effective.

We used UltraTax as our client portal and document management system, but it was getting very cumbersome to operate, with so many people on it. We also had HelloSign (now Dropbox Sign) for e-signatures.

Did you know? The typical company has on average 88 different apps in its tech stack, leading to unnecessary levels of complexity and soaring costs.

By switching to TaxDome, accounting firms can consolidate their tech stack and streamline their processes, allowing them to save an average of \$18,600 per employee per year. For a firm of Accurant's size, that's a potential annual cost saving of nearly \$750k.

**\$18,600
SAVED PER
EMPLOYEE
PER YEAR**

The solution: TaxDome

TaxDome's workflow automations save time and drive operational efficiency. By using ready-made templates or configuring custom workflows, firms are able to ensure nothing slips through the cracks. Here's a snapshot of what that has meant for firms that use TaxDome:



Since switching to TaxDome in late 2021, Accurant has been able to:



Improved team collaboration



Increase workflow visibility



Provide a superior client experience



Consolidate its tech stack

Improved communication and collaboration

Keeping a large team of more than 40 in sync is a huge challenge, especially with team members scattered across three states. TaxDome's unified workspace has helped the Accurant team stay organized and in the loop. And with client data readily available for all, it's easier for teammates to help each other and share expertise.

With TaxDome, we're able to access client documents, financial statements and tax returns from anywhere. If our preparer in Minnesota needed help with a tax situation he's never come across before, our preparer in South Dakota could access the same data through the portal – and they help each other out.

TaxDome provides Accurant's team with all the information they need to serve their clients. Instead of jumping between different systems and databases, it's all there in one place.

Our preparers can find out what they need about the clients and start working on their returns. Other preparers know that a client is already being worked on. Everything our preparers need is right there in TaxDome: the documents, the correspondence, earlier returns, any notes.



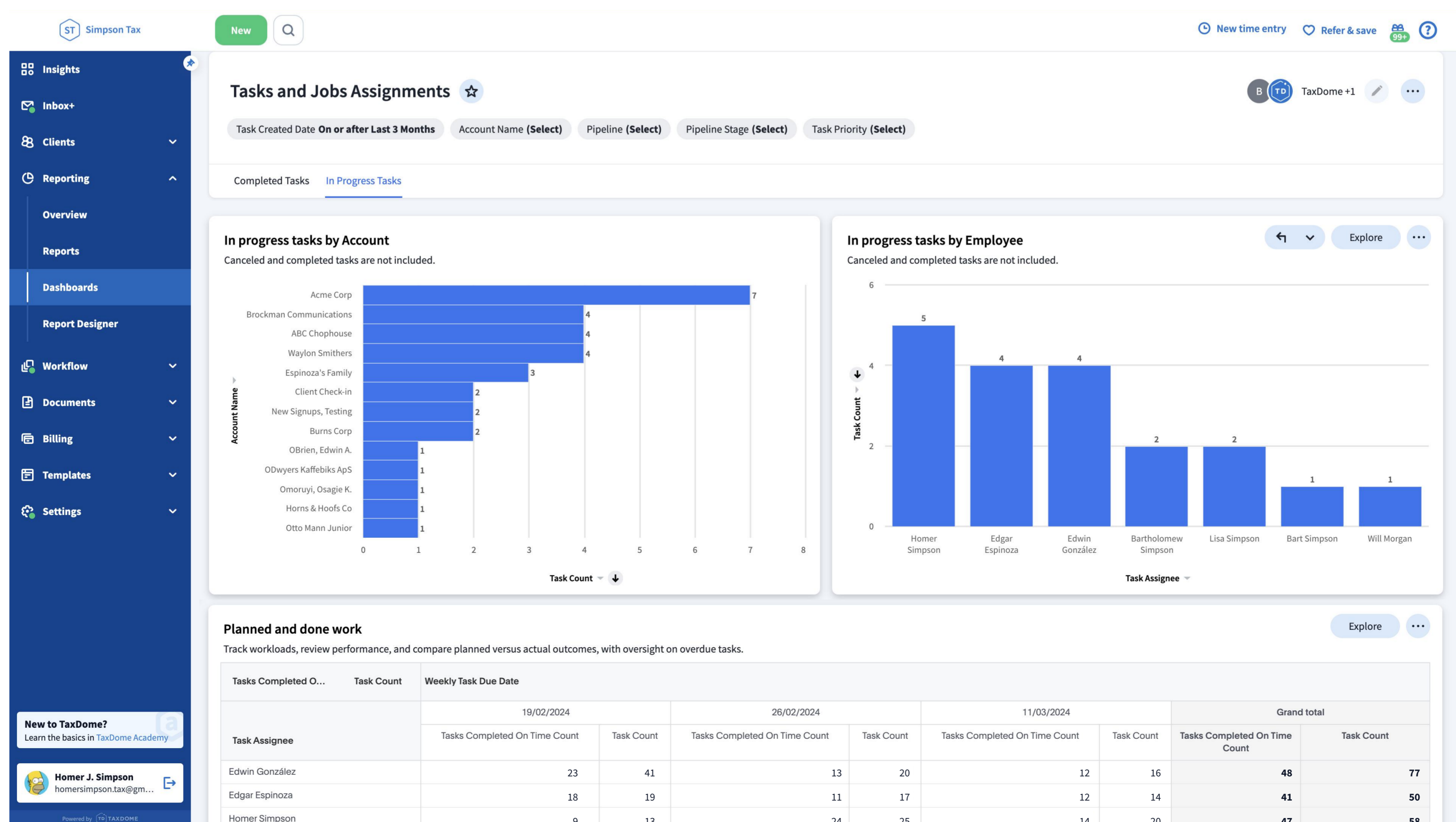
Increased workflow visibility

Accurant has a massive client base — more than 9,000 clients in total — and 40+ employees. Before TaxDome, it was difficult to track client tax returns and allocate work in the most productive way.

With TaxDome, Accurant’s managing partner now has a top-down view of who’s working on what, and where jobs are on their way towards completion. This has made it easier to prioritize work and track statuses and deadlines.

The workflows are invaluable. I can see a snapshot of where things are, and the number of clients in a certain stage of the workflow. I can slice and dice these numbers into a report — by office, by type of return — to see if any e-files have been rejected.

I can also see the correspondence between preparers and clients. The workflow is a great snapshot for capacity planning or troubleshooting. On top of everything, it gives a general idea of how many clients come back each year.



A simpler, more efficient tech stack

TaxDome has enabled Accurant to replace multiple standalone tools with a single, unified practice management platform. As a result, the team has been able to simplify processes, centralize data, and automate entire workflows.

Instead of jumping in and out of tools like Excel and HelloSign, the team can track client data and manage e-signatures in TaxDome. And where they once relied on their tax preparation platform UltraTax to manage documents and client interactions, they now have a superior client portal and document management system in TaxDome. This has enabled Accurant to replace UltraTax altogether with a simpler, more cost-effective tax preparation solution.

Right now, we're down to just our tax and financial software — and TaxDome.

Consolidating its tech stack has helped Accurant save costs by reducing the number of software licenses it pays for. Meanwhile, replacing Excel spreadsheets with TaxDome’s workflow automation has reduced the risk of manual errors.

The most powerful platform to manage teams, clients, projects

Firm management

Plan and manage the strategic side of work down to everyday tasks

Revenue operations

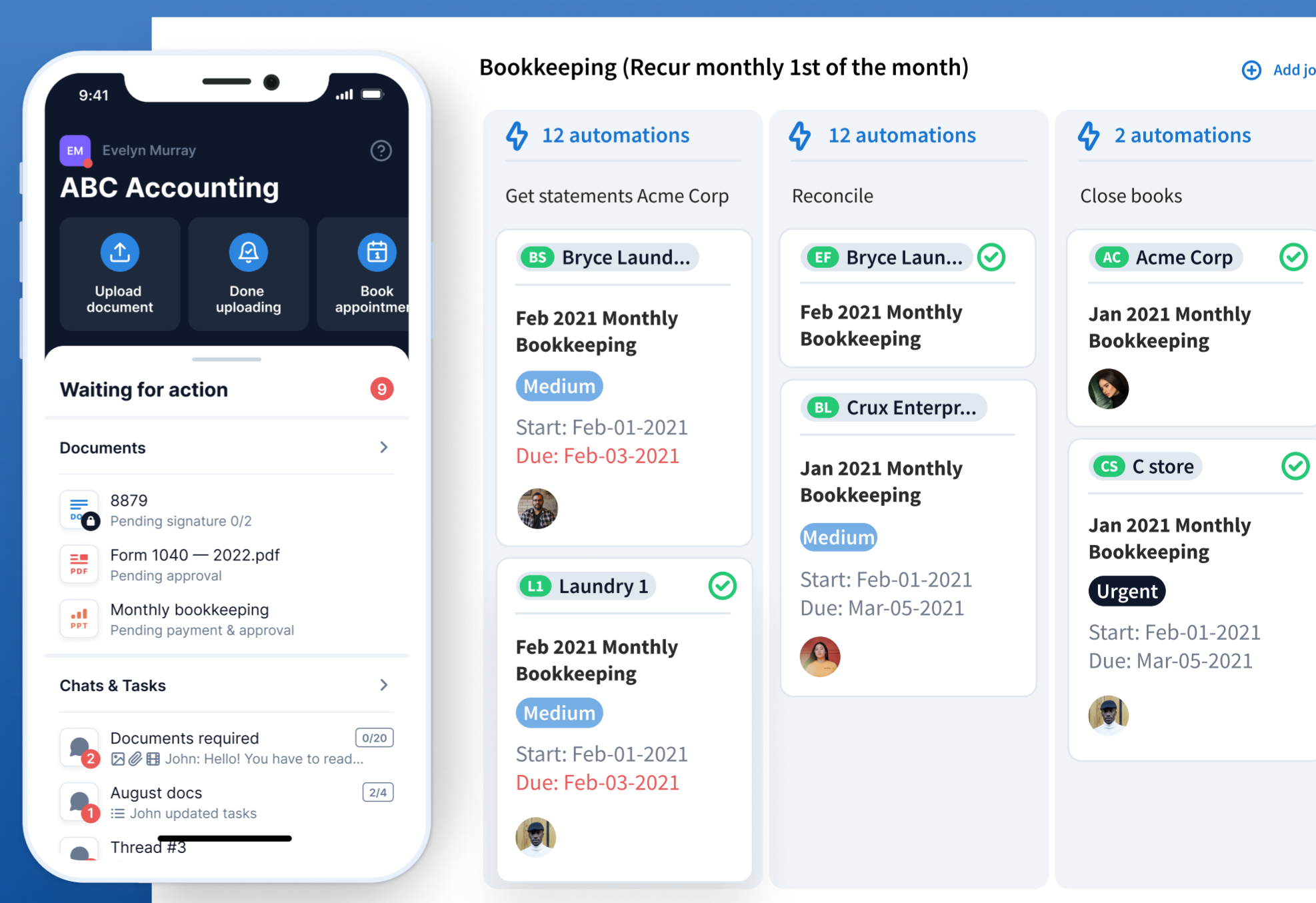
Get paid on time with streamlined invoicing and client billing built into your workflow

Client management

Maintain all client data, documents, communication, and tasks in a secure, centralized location

Client experience

Deliver a top-tier experience with a white-labeled client portal and mobile app that your clients will love



A superior client experience

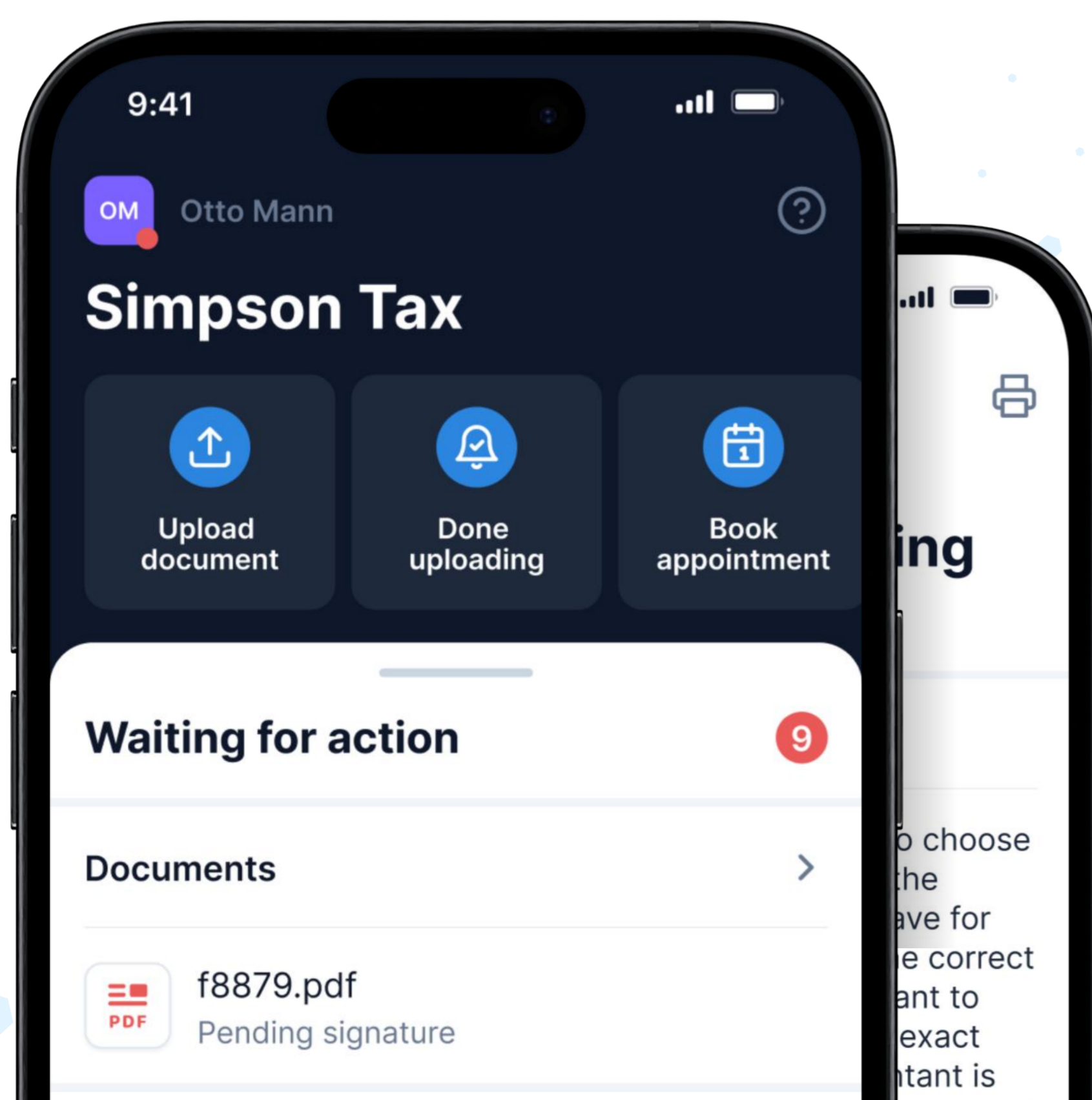
Thanks to TaxDome's client portal, Accurant's clients can interact with the firm and complete key tasks anywhere and on any device. This has helped Accurant retain and grow its client base, regardless of where they are located.

Our clients can upload their documents — by email or from their smartphone. They can communicate with our staff, view their returns and sign their 8879s — all remotely.

Because we're in the Midwest, we have a lot of 'snowbirds' — people who spend their winters in Florida, Texas or Arizona, and then return home in summer. The portal enabled us to keep clients who left town or relocated to a different state.

Client mobile app

Top 100 in the Apple App store | **1 million+** downloads



Results

By switching to TaxDome, Accurant has been able to:

Create a shared workspace:

Team members from different locations can now collaborate on client accounts, ensuring continuous improvement in the delivery of services

Retain and expand their client base:

Clients love the portal's simplicity, making interactions with the firm seamless and hassle-free — and happy clients tend to stick around

Save money and reduce complexity:

Consolidating its tech stack means fewer licenses to pay for, as well as simpler, more joined-up processes

Gain a bird's-eye view of work:

TaxDome offers complete visibility into workflows, team roles, progress, and deadlines

About TaxDome

TaxDome is rooted in a deep understanding of tax and accounting business needs.

We serve companies of every size — from teams of 100+ people to sole proprietors — leveraging cloud-based software to automate workflows and administrative tasks, centralize communications with clients and coworkers, store documents securely, and invoice with ease.

By freeing up your time and resources, we set the stage for growth – all while providing a superior client experience and making your day-to-day work easier.

Take your practice to the next level with TaxDome.

[Request a demo](#)

Industry leader trusted by 10,000+ firms

TaxDome has 6,000+ reviews on **Capterra**, **G2** and **GetApp** with an average score of **4.7/5**.

