

Building the Firm of Tomorrow with CCH Access

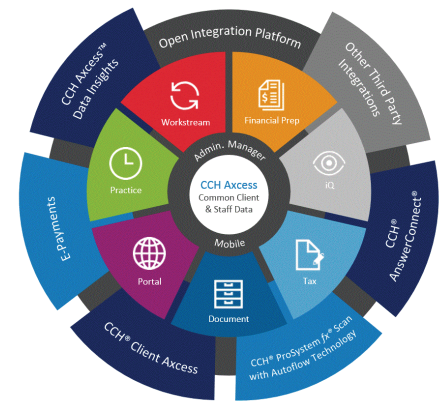
Chris Salisbury knows tech, and as a CPA, he knows accounting and taxes. But what really sets his firm apart is how he has combined the best tech with best practices to realize better client service and higher profits. After working for more than a decade at large regional firms in North Carolina, Chris and his partner Will Smith grew frustrated with the outdated and inflexible workflow model that most traditional firms still clung to, so they started Smith & Salisbury PLLC CPA (www.sands-cpa.com) in Charlotte in 2002. The full-service firm offers estate and wealth management planning, personal and business financial consulting, business startup services, QuickBooks support, tax compliance and IRS representation services.

From their firm's earliest days, when it was just the partners and one administrative assistant, and about \$200,000 in billings, Chris says he kept on the lookout for ways to be more productive, while improving client service as well. The firm turned to the professional accounting firm suite, CCH ProSystem fx, from Wolters Kluwer early on, and started moving to CCH Access, 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.

"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 Access, the completely cloud-based system, and use almost the entire suite of modules that are available on that platform." CCH Access 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 Access 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 Access were essential to the success of their transition.

The mobile capabilities of CCH Access, combined with the fixed pricing model, are very popular with the staff and with clients, Chris notes. The firm's eight staff are encouraged to work remotely when they want or need to, and the firm provides home office workstations in addition to office computers, both with multiple monitor setups (usually four screens) to maximize their productivity. With all staff having this mobile flexibility, even working from home some days during tax season, Chris says the firm is able to attract and retain highly-skilled professionals at all levels who want the ability to work when, and where, they want.

"CCH Access has given us the tools to better serve our clients without being tied to the office, and helps us reduce the monotony and headaches of the tedious aspects of paper shuffling."

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



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Read the 2019 review of CCH Access at www.cpapracticeadvisor.com/21081482