

CPA Practice Advisor

SPECIAL REPORT

Focus on Staffing

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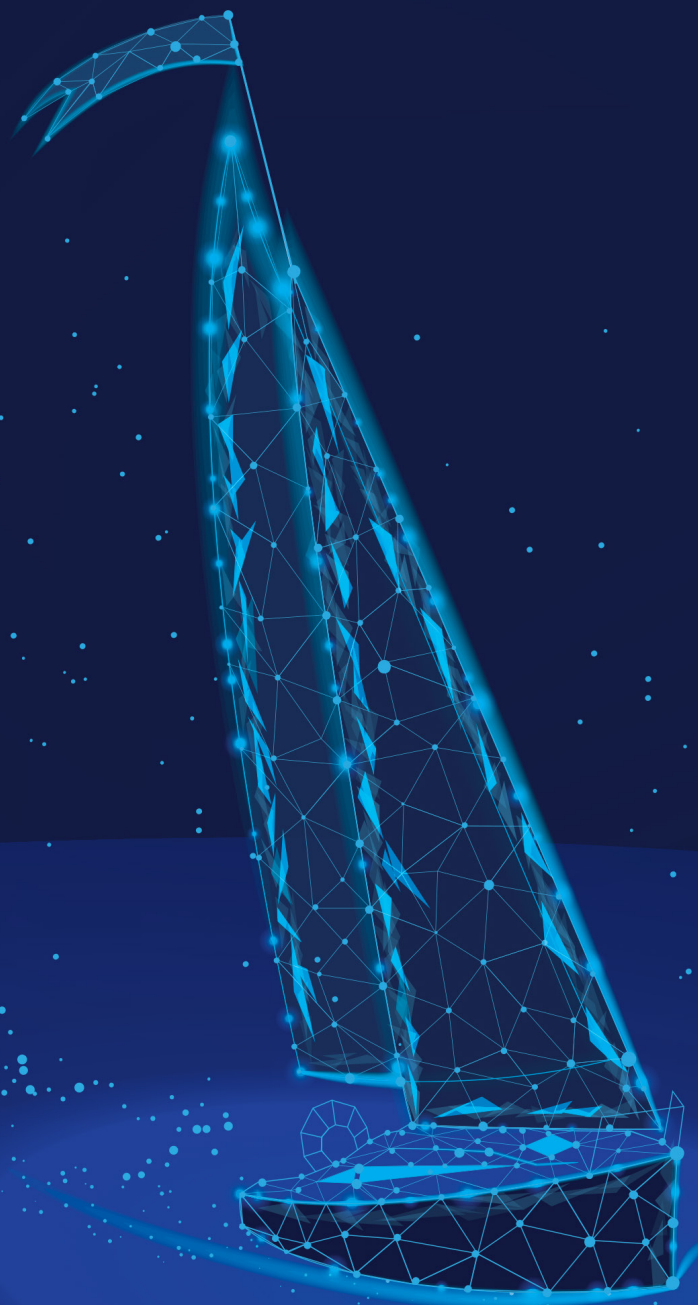
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SPECIAL REPORT

Focus on Staffing

It's likely you've heard reports about staffing challenges—not enough people lining up for jobs, those who are looking are expecting more from employers than in the past, employees want to be remote, some people prefer to be contractors—in fact, it's likely that you or your clients have experienced this first hand. Whether you're attempting to fill your own staff positions or advising clients on their hiring dilemmas, we hope that the information and resources provided in this Special Report will be useful to you.

Within these pages we'll discuss issues relating to remote employees, enhanced benefit offerings, new skillsets to look for in potential employees, options for hiring independent contractors, and much more.

We'd like to thank SafeSend for partnering with us to make this report possible, and you'll find information about SafeSend within these pages as well that will be helpful as you consider staffing concerns.

Gail Perry, CPA
Editor-in-Chief
CPA Practice Advisor

Special Report:
Focus on Staffing

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CPA
Practice **Advisor**

Soft Skills: The Most Undervalued Requirement for Today's Accountants

BY GENI WHITEHOUSE, FOUNDER, AUTHOR, KEYNOTE PRESENTER, THEIMPACTFULADVISOR.COM



While I dislike the term, “soft skills,” the moniker has become almost as accepted as the “bean counter” label that members of our profession have tried to escape. Often applied to certain fundamental interpersonal skills like communication, empathy, and connection, this label, which is intended to differentiate technical skills (“hard”) from non-technical ones (“soft”), downplays the importance of these skills which are critical to success in today’s highly automated world.

Traditional accounting services required primarily high levels of attention to detail and technical acumen. These services tended to attract skilled technicians who preferred interaction with numbers to people. In many cases, as these accountants rose through the ranks inside accounting firms, it was due to their technical proficiency, rather than their ability to connect with clients, manage staff, or bring in new work. In other firms, these technical experts ran up against roadblocks in their career paths if they resisted the need to acquire these new skills.

From internal roles like CFO and Controller to external public accounting roles, the requirements for accounting positions have changed. Technical skills are now considered a minimum requirement for success as an

accountant. Today’s accounting roles require knowledge of not only accounting and tax rules and requirements, but also an ability to translate them for clients. That means we must be adept at applying concepts to different industries, understanding business processes, applying tools and automation, and creating different what-if scenarios that help non-financial people make sense of complex, highly specialized information.

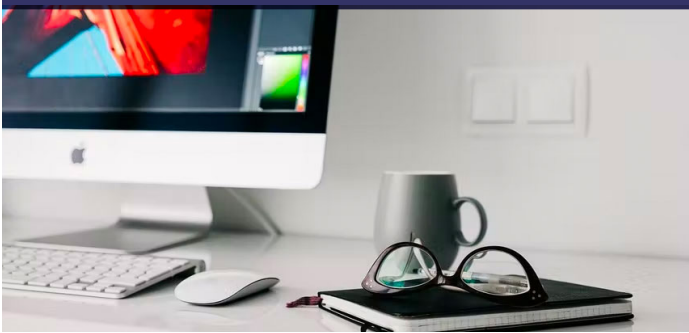
Accounting jobs are now designed for people who can apply the rules of accounting but can also help interpret them, seek out new insights, and guide teams in producing the desired results. Where consistency used to be a primary requirement, flexibility and agility are now more important for accountants who are dealing with new and evolving technologies, working with people, and reviewing processes on behalf of their clients.

Our firm has used the DISC method (based on assessments from Target Training International, Ltd.) to help identify staff with more of these new skills. DISC looks at four main behavioral styles: D for Dominant, I for Influence, S for Steadiness, and C for Conscientious. Where historically accountants were almost exclusively strong in the “C” conscientious dimension, new hires have more of a people orientation which is found in the “I” or “S” dimension of their communication style plus a good amount of the “C” or attention to detail attribute.

The danger, of course, is that we hire new staff members who are hungry to have more contact with clients, seek out new technologies, and make a real impact, but we continue to assign them to repetitive, back-office, compliance work and burn them out. We must provide new opportunities for staff at all levels to have training in these critical skills and then allow them to put those skills to use on behalf of their clients.

Hiring Remotely? Here's What You Need to Know

BY PAUL MCDONALD



Before 2020, remote hiring was nearly foreign in finance and accounting fields. In-person interviews and meetings—getting face time—was ingrained in the business culture.

Then a global pandemic hit. Firms that wanted to stay operational had to shift many aspects of their operations—including recruitment—to adapt to the new normal. And some did so with remarkable speed and agility. Research by global staffing firm Robert Half reveals more than half (53%) of organizations have hired new staff remotely since the pandemic began.

With this trend set to continue at least in the near-term, hiring managers in finance and accounting are finding advantages and fine-tuning the process—and establishing de facto best practices any company can learn from.

EMBRACING CHANGE

Switching to fully remote hiring may seem daunting, but there are big benefits to making the leap:

- **A bigger talent pool**—The move to virtual teams means businesses are no longer restricted to people in their geographic region. This opens up a much wider candidate pool with access to specialized or hard-to-find skills across the country—or even the world.
- **Increased automation**—HR tech tools are helping streamline recruitment, from evaluating resumes

to onboarding. Many firms now use AI-powered hiring to shortlist candidates, along with applicant tracking systems to instantly access candidate info and share feedback online.

OVERCOMING CHALLENGES

With these advantages to hiring remotely also come a few pain points. Here are 11 tips on how to overcome them:

1. **Adjust your advertising approach.** When job fairs and networking events were canceled as a result of the pandemic, the nature of advertising open jobs changed. Savvy recruiters learned to focus their efforts on social media platforms, web-based job boards and online job portals to access finance and accounting talent.
2. **Use specific job titles.** You want the role to sound interesting and dynamic, but it's best to stick to traditional titles that candidates will actually type into search fields. Advertising for an "Accountancy Wizard" or "Rockstar Excel Champion" is meaningless outside your office—and unlikely to rank well in search results.
3. **Include remote-related keywords.** If you want to interview candidates for a remote-only position, make your wording crystal clear. Use commonly searched terms, such as "work at home," "remote," "virtual" and "flexible" to ensure your listing appears in searches by candidates looking for remote roles. And be explicit about what remote and flexible actually mean. For example, are employees required to attend occasional in-person meetings? Can they implement windowed working hours when logged in from home? Will the position eventually change to being in-office?

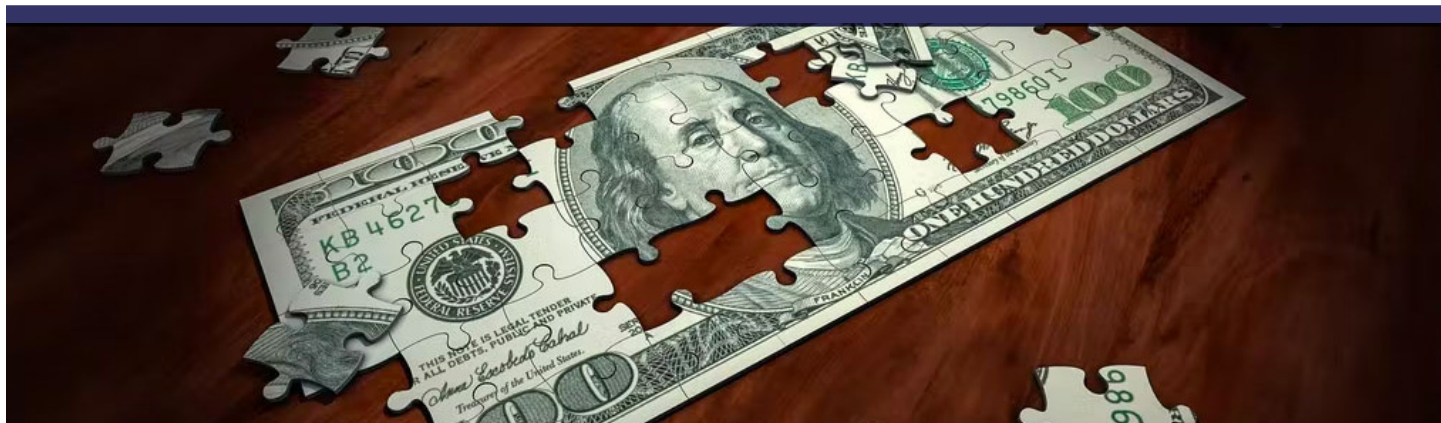
- 4. Be transparent.** Being upfront about what the job involves is even more vital when the role is remote. As well as listing desired CPA qualifications, the job specification should describe a typical workday and be forthcoming about any remote-related challenges. Not only does this set realistic expectations about the role, but you're more likely to attract the right candidates and avoid a deluge of unsuitable applications.
- 5. Imagine your ideal candidate.** This is a good place to start when recruiting for any job, but especially if you won't be meeting candidates in person. If you believe a certain personality type would work best for a remote position, include that in your listing. To narrow down your shortlist, ask candidates to take an online assessment or behavioral test as part of your initial process.
- 6. Focus on soft skills.** Hiring for a virtual team means looking beyond vocational expertise. Candidates must also have the skills needed to excel at working remotely. These might include great communication, time-management, self-discipline and accountability. Plus, an analyst who can't present data effectively on-screen or a public accountant unable to strike a virtual rapport with clients will struggle to do the job effectively using remote working tools.
- 7. Emphasize company culture.** Evaluating candidates for the ability to mesh with and even energize your existing team can be challenging face to face, let alone when the interaction is virtual. Start by identifying your company values, and translate these ideas into assessments or interview questions on which you can score candidates. For instance, if one of your values is "always be learning," ask candidates to tell you what they've learned professionally over the past year.
- 8. Offer fair compensation.** The hiring pool may have grown during the pandemic, but salaries are expected to remain stable, according to research from the [2021 Robert Half Salary Guide for Accounting and Finance Professionals](#). For example, despite challenging economic conditions, CPAs are in high demand to help firms stay afloat. Organizations that hope to attract top talent should expect to pay competitive wages for people with business-critical skills such as forecasting, analysis and auditing.
- 9. Consider a trial period.** Even once you've found the right candidate, it's still hard to know how well that person will perform on the job. Rather than extending a firm offer, many CFOs and hiring managers have a policy of offering contracts or trials of 30-90 days when hiring remote workers. This should be long enough to reveal any issues without negatively affecting morale.
- 10. Virtual onboarding is vital.** Ensure new hires have access to the equipment and resources they need before their first day, including accounts, tools and software. Send a welcome package, arrange virtual "meet the team" sessions—with groups and individual coworkers—and make sure fresh recruits know that your virtual door is always open.
- 11. Stay flexible for the future.** Even though we are moving to a post-pandemic time, it's likely that remote hiring will continue to some extent as companies realize the value of the widened talent pool and other factors. And flexibility is key, as well. During times of uncertainty, firms must be agile and ready to adapt to a changing business landscape. Finance leaders are turning to [an adjustable staffing mix of interim and full-time professionals](#) so they can push forward with high-priority projects while meeting routine needs.

Firms that have been able to update their hiring processes, harness the full potential of their remote workforce and create meaningful, lasting change can position themselves to move forward post-pandemic more resilient and competitive than ever.

Paul McDonald is senior executive director at Robert Half, the world's first and largest specialized staffing firm. He writes and speaks frequently on hiring, workplace and career-management topics. Over the course of more than 30 years in the recruiting field, McDonald has advised thousands of company leaders and job seekers on how to hire and get hired.

2022 Independent Contractor Update

BY NELLIE AKALP



By the time [California's AB5 worker classification ruling](#) went into effect on January 1, 2020, employers and independent contractors were already fighting to have their business models considered exempt. In brief, [California's AB5](#) goes beyond the Internal Revenue Service's (IRS) [independent contractor classification test](#) and assumes workers are employees unless the worker passes a 3-point "ABC" test.

An independent contractor must meet the following criteria:

- (A) The person is free from the control and direction of the hiring entity in connection with the performance of the work, both under the contract for the performance of the work and in fact.
- (B) The person performs work outside the usual course of the hiring entity's business.
- (C) The person is customarily engaged in an independently established trade, occupation, or business of the same nature as that involved in the work performed.

Industries, such as trucking, ride-share services (Uber, Lyft), and food-delivery services, immediately balked at the new, stricter guidelines. Some courts agreed and granted a temporary exemption to several kinds of workers.

And then, the Covid-19 pandemic hit.

The number of gig economy workers [grew 33% in 2020](#), partly due to the shelter-in-place orders increasing the demand for food and goods deliveries. Further blurring the lines, some independent workers were offered general and unemployment benefits during the pandemic—which are typically reserved for employees.

Although the idea of AB5 was to protect workers from employers wanting to avoid paying payroll taxes and dodge other labor regulations, many freelancers also wanted to maintain their independent contractor status and remain free from employer/employee restrictions.

So, what has happened in California since AB5 went into effect? Has anything changed in other states?

CALIFORNIA AMENDMENTS

California's AB 2257 was enacted in September 2020 and:

- AB 2257 included a modified and expanded list of professions exempt from the "ABC" test. These changes primarily impacted freelance writers, vocalists, musicians, film crews and visual artists, licensed professionals, truck drivers, real estate and home appraisers, and some salespersons.
- AB 2257 also made clearer stipulations to the independent contractor classification, such as:
 - Contractors must have a separate business address
 - Contractors must carry their own business insurance

- Contractors can hire and fire their own help
- Contractors can receive feedback on work done but are not required to follow it

Proposition 22 was passed by California voters in 2020 to amend AB 2257, but it was declared “unconstitutional” in 2021 by a California judge. That ruling is being appealed, but the proposition remains in effect, awaiting the outcome.

- Prop. 22 deemed app-based drivers (Uber, Lyft, etc.) to be independent contractors and not employees. However, some labor and wage policies specific to app-based drivers still apply, such as limiting hours and requiring some health care subsidies.

With these actions, there are currently about 75 professions now exempt from the independent contracting test set out in AB5. To help your clients maintain their independent contractor status, make sure they don't mix their business expenses or purchases with personal ones. It also helps prove their independent status if they register their companies as legal entities with the state, such as a corporation or limited liability company (LLC).

Likewise, if your clients use independent contractors in their companies, make sure they scrutinize the working relationship, get contracts in writing (with a project end dates), and ask for references from other clients to show the worker's income is not dependent on one company.

AB5 ACROSS THE U.S.

In January 2021, the U.S. Department of Labor (DOL) issued a [ruling](#) to clarify whether a worker may be classified as an independent contractor versus an employee under the Fair Labor Standards Act (FLSA). The DOL determined that two core factors should be applied to a worker. If both factors point to a definite classification, the business can classify the worker by that determination:

1. The nature and degree of control over the work

2. The individual's opportunity for profit or loss If, however, the first two core factors point to separate conclusions, the employers must then look at three other factors to decide:
3. The amount of skill required for the work
4. The degree of permanence of the working relationship between the individual and the potential employer
5. Whether the work is part of an integrated unit of production

In addition to the federal guidelines, each state has adopted its own guidelines for employers, which should be reviewed for every state where your clients have workers. According to the [Economic Policy Institute \(EPI\)](#), more than 20 states have adopted the ABC test for determining whether an individual is an employee or an independent contractor.

By shifting the classification responsibility to the employer, these 20 states hope self-regulation will reduce the number of misclassification violations occurring year after year. Plus, as the construction industry can be particularly confusing, some states use the ABC test specifically to determine independent contractor status for construction workers.

AN ONGOING PREDICAMENT

Employers consistently misclassify workers, which could land them in big trouble with state and federal labor departments, resulting in heavy fines and possibly having to compensate workers for back pay and benefits. You can help by recommending that clients keep separate business and personal finances, set up a separate business address and bank account, create a legal entity for their companies, and acquire the correct licenses and permits to run a business.

***Nellie Akalp** is a passionate entrepreneur, business expert, and mother of four. She is the CEO of [CorpNet.com](#), a resource and service provider for business incorporation, LLC filings, and corporate compliance services in all 50 states. Akalp and her team recently launched a partner program for accountants, lawyers, and business professionals to help them streamline the business incorporation and compliance process for their clients.*

PKF O'Connor Davies Announces Updated Flexible Work Policy and Enhanced Benefit Offerings



In April, 2022, PKF O'Connor Davies, LLP, one of the nation's largest accounting, tax and advisory firms, announced key updates to its "Schedule Your Work Week Policy" hybrid work program. These updates incorporate the best practices and approaches that have emerged over the last two years of the COVID-19 pandemic into the program, which remains among the most flexible in the profession. These updates are designed to maximize the mentoring and team building that comes with on-site work while empowering the firm's employees to retain greater control over their professional and personal lives. Additionally, the firm announced a four-day Summer Schedule Pilot Program and enhanced bonus schedule, furthering its commitment to fostering an industry-leading culture and benefits package.

"Despite the challenges and changes of the last two years, one thing remains clear: We work better when we work together," said Kevin J. Keane, Executive Chairman at PKF O'Connor Davies. "Our updated policies are a focused effort to maintain the flexible working conditions that have worked so well while fostering the collaboration, mentoring and team building that defines our culture. With those goals in mind, we're also unveiling key enhanced benefits that underscore our focus on giving our team members the skills and incentives they need to drive our firm forward."

The updated policy provides key guidance based on team members' roles within the firm and their wishes when it comes to where and how they work. Team members who prefer to work in the office full-time

will be welcomed, and locations will continue to follow all COVID-19 guidelines from the U.S. Centers for Disease Control. Team members who are currently approved to be fully remote will continue to have that option. Team members with a hybrid arrangement are encouraged to work from any of the firm's physical locations eight days a month.

As part of the plan, these on-site days will be selected in coordination with team members and leaders to strategically maximize client service and culture building opportunities. These updated policies will lead to a more collaborative hybrid working environment while ensuring team members are safe and feel safe when they're in the office.

In addition to the "Schedule Your Work Week Policy" updates, the firm announced two new benefits that further its commitment to a flexible and high-performing culture. The firm's enhanced bonus program includes an increase to the amount allocated to the bonus pool and accelerates the annual review process to better align with Learning and Development initiatives.

The firm also unveiled its 2022 Summer Schedule Pilot Program, which allows team members to work four days a week during summer months, provided they still meet productivity and hours-worked requirements during each week.

"We are continuously looking for ways to be an industry leader in providing a meaningful work/life balance and rewarding our high-performing team members," said Dawn Perri, Chief Human Resources Officer at PKF O'Connor Davies. "The updates to our hybrid work policy, along with these additional benefits, are really a reflection of the great work our people do day in and day out. It's their commitment to client service that fuels our culture and our ability to implement flexible schedules and meaningful incentives."

PKF O'Connor Davies continues to expand through organic growth and acquisitions. It has supported this growth with a strategic combination of promoting from within coupled with an ongoing focus on top-tier external hires.

Job Flexibility More Important than Salary? This Could Be the New Normal



In the summer of 2021, Grant Thornton LLP has released a survey that helps explain why millions of people have left their jobs in recent months. The firm's [State of Work in America](#) survey engaged more than 1,500 full-time employees of U.S. companies. Through questions about hybrid work, healthcare, culture and benefits, Grant Thornton has shone a light on what employees value—and what companies can do to retain talent.

According to the survey, the trend that experts have dubbed “The Great Resignation” may not end anytime soon: 33% of survey respondents say they are actively looking for a new job.

“There is most definitely a war for talent occurring, with an intensity unseen in recent years,” says Tim Glowa, a principal and leader of Grant Thornton’s employee listening and human capital services offerings. “Our survey finds that workers want flexibility. But ‘flexibility’ does not mean working from home 100% of the time, and physically returning to work does not mean being in the office five days a week.”

Instead, Glowa explains employees want workplaces that are understanding of responsibilities like childcare and eldercare.

“Everyone has a unique set of responsibilities outside of the office,” Glowa adds. “As companies return to the office, it will be more crucial than ever to give people the time they need to take care of what’s important at home.”

RETURN TO WORK

Among those polled for Grant Thornton’s *State of Work in America* survey, 56% are looking forward to physically returning to the office. However, it appears the *requirement* to be in the office full-time is a driving factor that is motivating record resignation. According to the survey, 79% of survey respondents say they want flexibility in when and where they work, while 40% say they will look for another job if forced to return to the office full time.

“The challenge that companies face is creating an engaging experience for all employees, whether they are working in an office or remotely,” says Jennifer Morelli, a principal and leader of Grant Thornton’s Business Change Enablement practice. “Organizations need to make sure they are providing meaningful opportunities and reasons to come into the office. For example, in-person working sessions, an important meeting or a team-building event.”

Ultimately, the *State of Work in America* survey revealed that flexibility is perhaps one of the most desired attributes in the modern workplace. More than half (51%) of the employees interviewed by Grant Thornton say they would give up a 10%-20% salary increase for more flexibility.

“People value employers that respect their time, their family responsibilities and their work-life balance,” says Glowa. “Employers that put that respect into action are well-positioned to win the ongoing war for talent.”

RETAINING TALENT DURING “THE GREAT RESIGNATION”

While employers have been pondering their return-to-work strategies, the benefits landscape has changed. Grant Thornton’s *State of Work in America* survey shows that many employees are satisfied with their benefits, but a large contingent have significant concerns over healthcare. Approximately 30% of survey respondents feel like the amount they pay for healthcare is not transparent, and they are not confident that they have chosen the best medical plan.

Grant Thornton leaders say that addressing those concerns will require both detailed communication and ongoing benefits evaluation. Through a process called ‘employee preference optimization,’ companies can find ways to enhance the benefits people use and value—and save money at the same time. Frequent check-ins and active listening are also vital, as is a concise yet effective internal communications plan that relays key benefits information.

“To better attract and retain employees— especially in a tight labor market— requires thinking like a marketing professional,” Glowa adds. “You need to understand employee pain points, then brainstorm potential solutions and benefits to address them. If you can fix that pain point, you’ve made a big difference in the eyes of employees— ideally, in a way that is difficult for competitors to replicate.”

Those concerns about healthcare also seem to have a direct impact on workplace stress. As this survey reveals, medical issues are one of the most common sources of stress, surpassed only by personal debt. Ability to retire, work-life balance and mental health round out the list of top five sources of stress. However, some of the most common pain points are directly related to workplace culture.

Almost half (45%) of survey respondents say they do not believe their employer understands their needs as an employee, and 40% say they do not feel like their voices are heard at work. Further, 34% indicate interacting with their manager is the most stressful part of the day. This could be due to management style or the sheer fact some managers don’t have the proper training.

Grant Thornton leaders emphasize that there is no one-size-fits-all solution to these issues. Yet, as Glowa puts it, “thinking like a marketing professional” can lead to better value propositions for employees— and ultimately help retention. Companies may need to focus on training stronger managers, optimizing their benefits and total reward packages, or enhancing workplace culture.

But no matter what steps companies take, the *State of Work in America* survey indicates that the employee

experience— and understanding what keeps your people up at night— must take precedence.

“There is a bright spotlight on leadership and how leaders are treating employees,” Glowa concludes. “Leaders need to walk the talk, because employees are watching closely.”



Staffing Challenges

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To see additional find-

ings from Grant Thornton’s *State of Work in America* survey, visit:

grantthornton.com/library/articles/tax/2021/assessing-the-state-of-american-workers.

To view a webcast that examines the *State of Work in America* survey in more detail, visit:

grantthornton.com/events/tax/2021/10-07-the-state-of-work-in-america.

Addressing Accountant Shortage Challenges with Automation Solutions



From accounting firms to zoos, the struggle to find staff is literally impacting businesses from A to Z. Retailers attempt to hire help for the holiday season while tax and accounting firms scramble to hire admin staff in anticipation of the upcoming busy season. Halloween may be right around the corner, but the accountant shortage isn't a trick or a treat; it's a frightful dilemma, but tax automation solutions in the [SafeSend Suite](#) can help.

THE PROFESSION IS STILL FACING STAFFING CHALLENGES

More than halfway through year two, the effects of the Covid-19 pandemic are still felt, especially when it comes to staffing. The current lack of candidates is challenging, but the responsibilities of firms don't change. Tax returns still need to be completed and filed. So, what does this mean for firms and what solutions are available to help address the accountant shortage as the next busy season approaches?

Some of the essential tasks that need to be addressed during busy season are labor intensive:

- **Sending out client organizers**
- **Reminder calls for unreturned documents**

- **Scanning returned documents**
- **Tracking down unsigned e-file forms**

These tasks are crucial to the tax engagement process, but, done manually, they consume a lot of time. Extra hands made the work light – or at least eased some of the burden. But if you're suffering from an accountant shortage, that means fewer tax staff are available and the task of completing everything by the tax deadline can seem insurmountable. Now, more than ever, it is important to assess current processes, make necessary improvements, and accurately forecast your needs.

AUTOMATION UNLOCKS THE DOOR TO WORKFLOW EFFICIENCY

The key to this daunting task is adaptability; and automation unlocks the door for your firm to thrive.

Advances in automation technology mean that the time historically spent on manual tasks can be reduced. This translates into more time for your current admin staff to focus on other projects and reducing the accountant shortage impact on your firm.

The SafeSend Suite offers powerful functionality to tax and accounting professionals. Every client touch point across the tax engagement can be automated, saving your firm time and mitigating security risks. Automating those essential yet time-consuming tasks means your staff can accomplish more in less time.

A huge chunk of time has historically been spent on printing and sending client organizers and engagement letters. When preparing for the upcoming tax season, electronically fillable organizers and securely collected source documents are examples of automated solutions that simplify and streamline the gathering of information

necessary for completing the tax return. [SafeSend Organizers](#) converts static PDF organizers from your tax compliance software to a fillable form that can be sent directly to clients. A batch reminder option within SafeSend Organizers saves admins from spending hours on the phone or manually sending email reminders. The document tracking and reporting feature means staff automatically know who has returned their organizer and which organizers are still outstanding.

Engagement Letters can be included with the SafeSend Organizer package, eliminating another task for firm staff. Clients sign the engagement letter as one of the steps in the intuitive, guided process. They fill out the organizer electronically and, finally, upload source documents as a part of the process. Say a fond farewell to staff sorting through and scanning shoeboxes of receipts and documents! The information needed to complete the tax return is instantly available when clients simply return the SafeSend Organizers package – and it's in a format that doesn't require hours of manual data entry into your firm's tax software program. This means with the tax accountant shortages your firm has one less labor-intensive task.

SAVING TIME & SAVING MONEY

At the core of the SafeSend Suite, SafeSend Returns is a [multi-year winner of the CPA Practice Advisor Technology Innovation Award](#). This automation solution eliminates the manual, labor-intensive elements many tax departments experience producing client-ready tax returns. By automating assembly and delivery of

the completed tax package, the last mile of the tax engagement takes just minutes. Automated reminders and tracking mean less time your staff has to spend following up with clients.

[SafeSend Returns](#) gives your firm precious time back when it's needed the most: tax season. Even better, your firm can be up and running with SafeSend Returns within 3 hours; that's even more precious time savings. Saving money is an added benefit. The time saved with each return means less payroll hours. Paperless processes mean less money spent on paper and postage. Saving time and money is a win-win!

There may be a deficit in workers, but automation can help you overcome accountant shortages that impact your firm this time of year. Your staff will love how much time the SafeSend Suite saves them by taking the manual labor out of assembling, delivering, collecting e-signatures, sending reminders, providing payment vouchers, reporting and tracking on client activity, and K-1 distribution of business and trust returns. Clients will appreciate the ease of reviewing and signing documents with a straightforward, intuitive process that is familiar throughout [every step of the tax engagement](#). And they'll love the freedom to utilize their desktop, tablet, or mobile device!

Change can be scary. But continuing to manually address tasks might be causing your staff more work and costing the firm more money. How can you help your team thrive? The trick is to treat your firm to the SafeSend Suite. This sophisticated technology is wicked fast for your firm and wicked simple for clients!

***“The easiest thing to quantify is time. A simple, small return could take up to 30 minutes to assemble by paper. Now, all returns, no matter the size, take 5 minutes. Our assembly team loves SafeSend Returns. Year to date including the 2019 tax year and so far in 2020, we've processed roughly 1,400 returns. If we spend a minimum 25 minutes per return, that equals 35,000 minutes or 583 hours. That's still only a fraction of our total amount of returns; SafeSend Returns has saved 583 hours!*”**

- Leizel Acres, Supervisor,
Friedman & Huey Associates LLP

Resources:

TOP 6 QUESTIONS FIRMS ASK ABOUT SAFESEND'S WORKFLOW AUTOMATION PLATFORM

safesend.com/about/news/top-questions-about-workflow-automation

WHAT THE CLASS OF 2022 WANTS

thelassenetwork.com/wp-content/uploads/2022/04/What-the-Class-of-2022-Wants.pdf

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cpapracticeadvisor.com/webinars/video/21118687

BRIDGING THE SOFT SKILLS GAP: HOW TO TEACH THE MISSING BASICS TO TODAY'S YOUNG TALENT

amazon.com/Bridging-Soft-Skills-Gap-Missing/dp/1119171407

QUESTIONS THE INTERVIEWER SHOULD ASK

smallbiztrends.com/2016/08/accounting-interview-questions.html

21 ACCOUNTING INTERVIEW QUESTIONS YOU NEED TO ASK

roberthalf.com/blog/how-to-interview-candidates/

10-effective-interview-questions-for-accounting-and-finance-professionals

12 INTERVIEW TIPS TO HELP YOU HIRE NEW ACCOUNTANTS FOR YOUR FIRM

tax.thomsonreuters.com/blog/12-interview-tips-to-hire-new-accountants-for-your-firm

About the sponsor



Add SafeSend automation solutions to your existing tax compliance software system to speed up manual, labor-intensive tasks at every client touchpoint in the tax engagement life cycle. The [SafeSend Suite](#) combined with [SafeSend Exchange](#) offers tax and accounting professionals a simple way to reduce the back and forth of client communication through each season of the tax year!

Workflow Automation for the Win

Empower your staff, improve processes, and save time and money with the SafeSend Suite workflow automation platform. From engagement letters and client organizers to assembly, delivery, and e-signing of tax packages, the SafeSend Suite makes it easy!

Staff love reducing the time they spend on manual, labor-intensive tasks. Clients love the intuitive, consistent experience at every step of the tax engagement. And partners love the time and money saved.

Schedule a demo at safesend.com



This Special Report is brought to you by CPA Practice Advisor and SafeSend.

