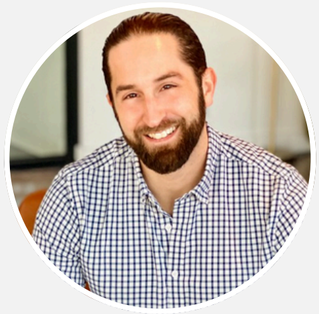
The Hidden Cost of Disconnected Tax Workflows

Presenters

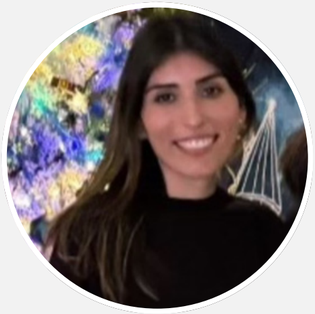


Jonathan Young

VP of Growth

Monica Bravo

Product Marketing Manager



Agenda

The New, Costly Reality for Firms

How friction shows up as stress, rework, and risk

Five Stages Where Friction Repeats

Engage → Collect → Prep & Review → Deliver → Archive

What Changes When Workflows are Intentional

Create calmer, more predictable experiences for clients and staff

Q & A

We'll answer your questions submitted during the webinar

The New, Costly Reality for Firms

Even with more technology, stress and rework continue to rise



SmartVault

SmartVault.com

Friction shows up as stress, rework, and risk

Industry Pressure is Compounding

Technology expansion, rising client expectations, and compliance demands are increasing the complexity instead of reducing work.



What Firms Experience Every Day

- Time lost to intake and follow-ups
- Bottlenecks during prep and review
- Manual work created by disconnected systems

Industry Benchmarks

97%
Tech Inefficiency

50%
Increased Manual Work

25%
Track Workflow ROI

71%
Tech Drives Retention

A Cognitive Cost

The problem isn’t volume, it’s *fragmentation*

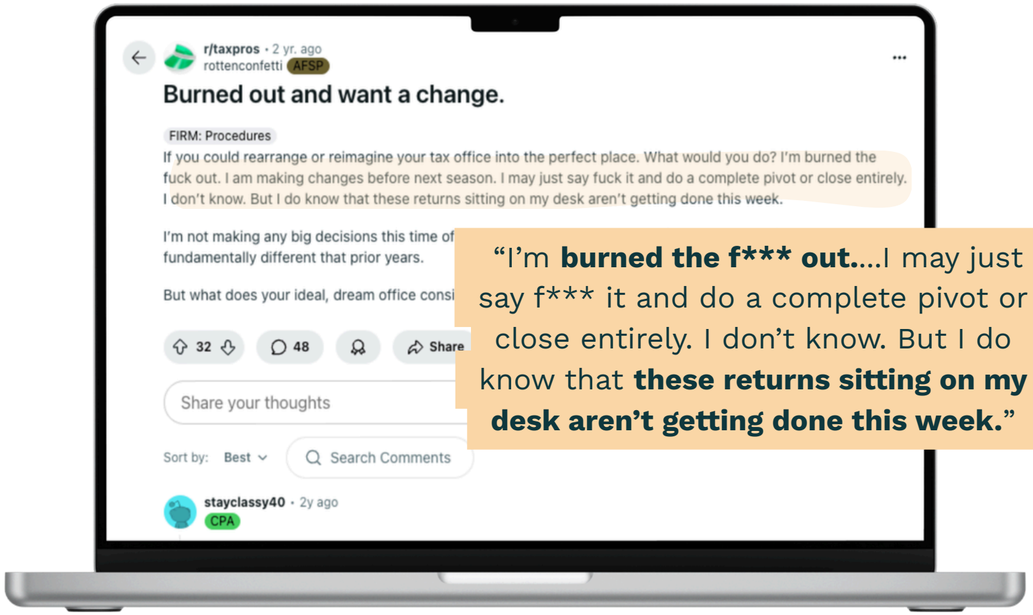
Most firms blame volume, deadlines, or clients, but **the real culprit: disconnected systems force constant decision-making.**

DID YOU KNOW?

Most firms use 8–12 apps.
Every handoff creates friction.

The Costs of Disconnection

- **60–90 min lost per return**
- 4 hrs/week lost to app switching
- Every extra login adds exposure
- Fragmented experience kills loyalty



“I’m **burned the f*** out.**...I may just say f*** it and do a complete pivot or close entirely. I don’t know. But I do know that **these returns sitting on my desk aren’t getting done this week.**”

Accounting & tax pros voice challenges and worries on community Reddit forums

“**I rushed a return**, made a mistake... weeks later the **client got a notice.**”

“I cannot keep up with my workflow. I don't know if it's volume or if it's the actual work itself. **I find myself making mistakes**... I do 99% of things very well, but **when I make mistakes like these the stress compounds**.”

A Confidence Cost

What clients expect

- Simplicity — they don’t want homework
- Convenience — instant access and mobile-first interactions
- Security — sensitive data handled carefully
- Professionalism — CPAs remove work, not add to it

Your team’s stressed, and clients feel it

- Being “always on” to respond, follow up, and reassure
- Chasing missing information while trying not to frustrate clients
- Managing delays caused by non-responsiveness
- Absorbing frustration from antiquated processes



PS: Static Organizers are dead

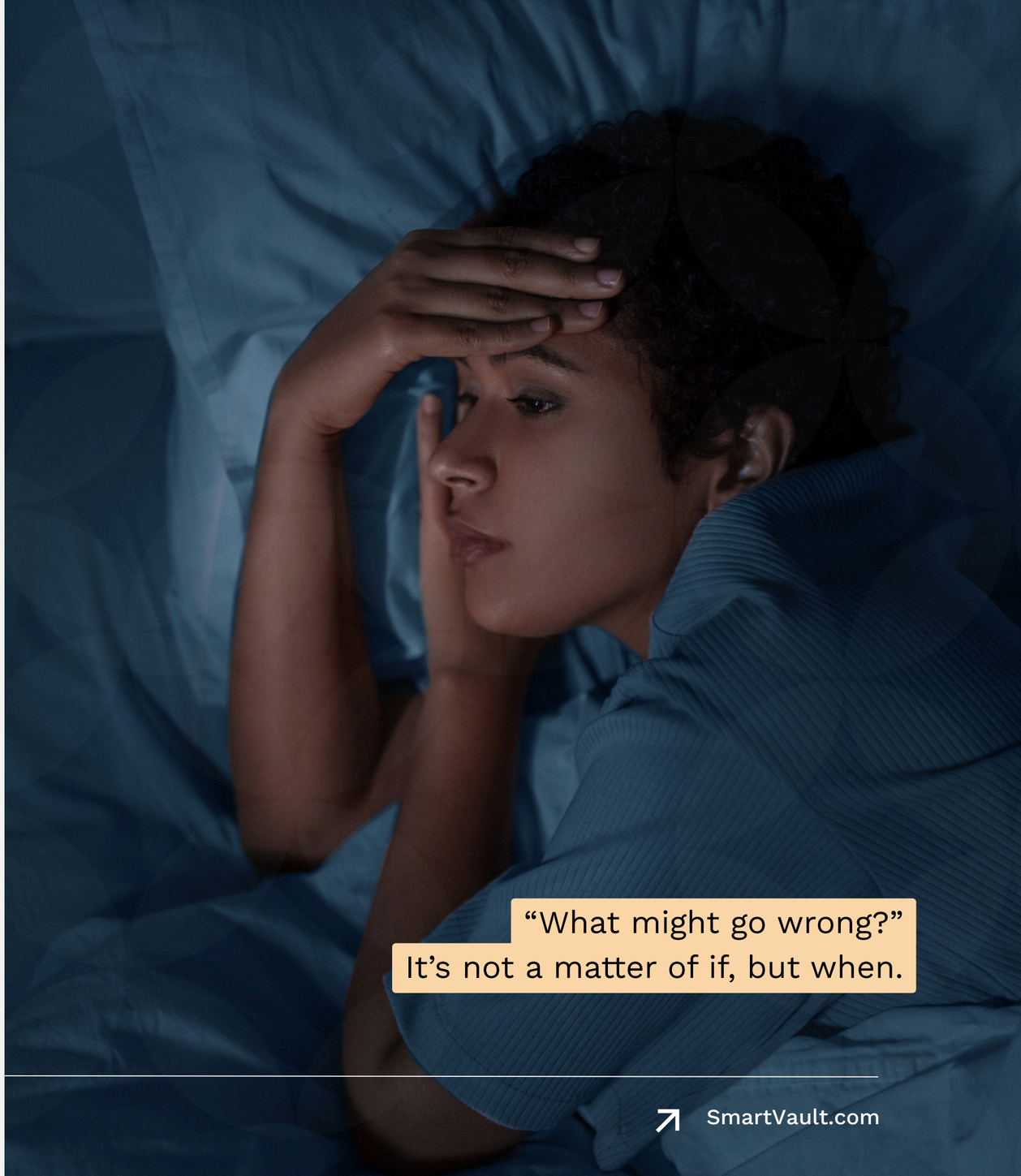
- Long, static, irrelevant = abandoned by clients
- “Modern” PDFs still feel like they’re doing the work
- Repetitive questions signal disorganization

A Compliance Cost

The Quiet Source of Ongoing Stress

Risk worries aren’t loud.
They’re constant.

- Security expectations today are higher and less forgiving
- Compliance risk doesn’t live in one moment; it spans the entire workflow
- Each handoff, inbox, and duplicate file increases subliminal stress and pressure
- When processes aren’t clear, uncertainty quietly grows into anxiety



Polling Question

How many returns does your firm complete annually?

- 0
- 1-49
- 50-249
- 250-999
- 1,000+

Polling Question

What tax prep tool does your firm use?

- Drake
- Intuit Lacerte
- Intuit ProConnect
- Intuit ProSeries
- Thomson Reuters UltraTax CS
- Wolters Kluwer CCH
- Other

The Five Stages of the Modern Tax Workflow

Breaking down where friction repeats and its impact

SmartVault



SmartVault.com

Where does friction show up in the workflow?



Engage

Initial client onboarding, proposals, pricing, and engagement



Collect

Requesting, receiving, and organizing client information and documents



Prep & Review

Preparing returns, reviewing work, answering questions, and correcting issues



Deliver

Delivering completed returns, collecting signatures and approvals, and filing



Archive

Storing final documents, maintaining records, retention and access requirements

We’re breaking down *where* friction compounds when stages aren’t connected.

Polling Question

Which part of the tax workflow causes the most stress and friction for your firm?

- ENGAGE
- COLLECT
- PREP & REVIEW
- DELIVER
- ARCHIVE

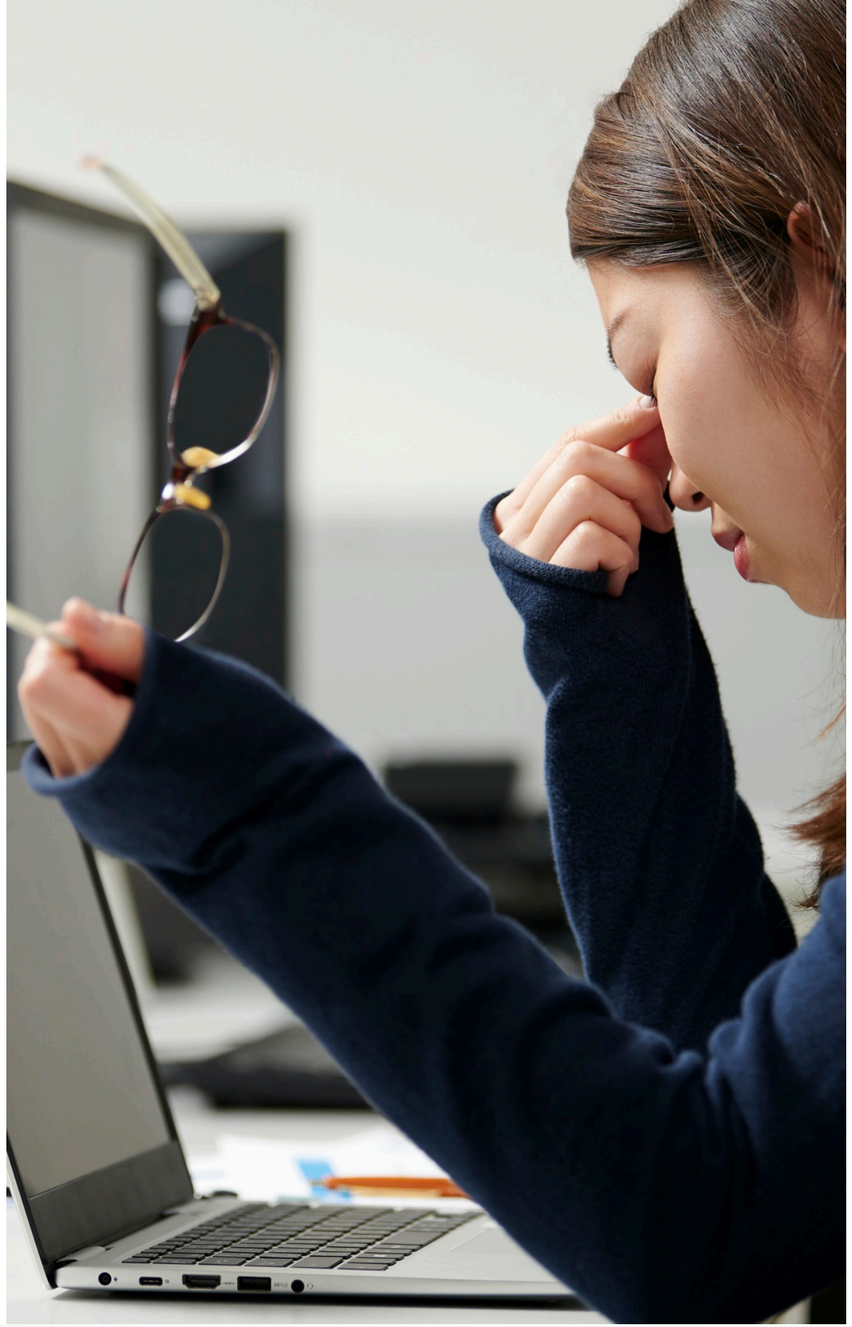
Engage

46% of firms

admitted they don’t have an onboarding process

Inconsistent processes here

sabotage every stage downstream



Engage

46% of firms

admitted they don’t have an onboarding process

Inconsistent processes here

sabotage every stage downstream



Reduce Uncertainty Before Work Begins

- Standardize how every engagement starts so staff and clients know what to expect
- Clearly define scope, timelines, and responsibilities upfront
- Establish a shared understanding of how communication and follow-ups will work
- Remove ambiguity early to prevent downstream confusion and rework

Collect



60-90 minutes lost per return



Static, generic organizers overwhelm clients



Calculate Your Document Collection Cost:

1.5 hours
× [your return volume]
× [your hourly rate]
= your annual collection cost

For a 500-return practice that bills $40/hour, that's 750 hours annually—$30,000 in staff time—devoted entirely to collection.

Collect

60-90 minutes lost per return

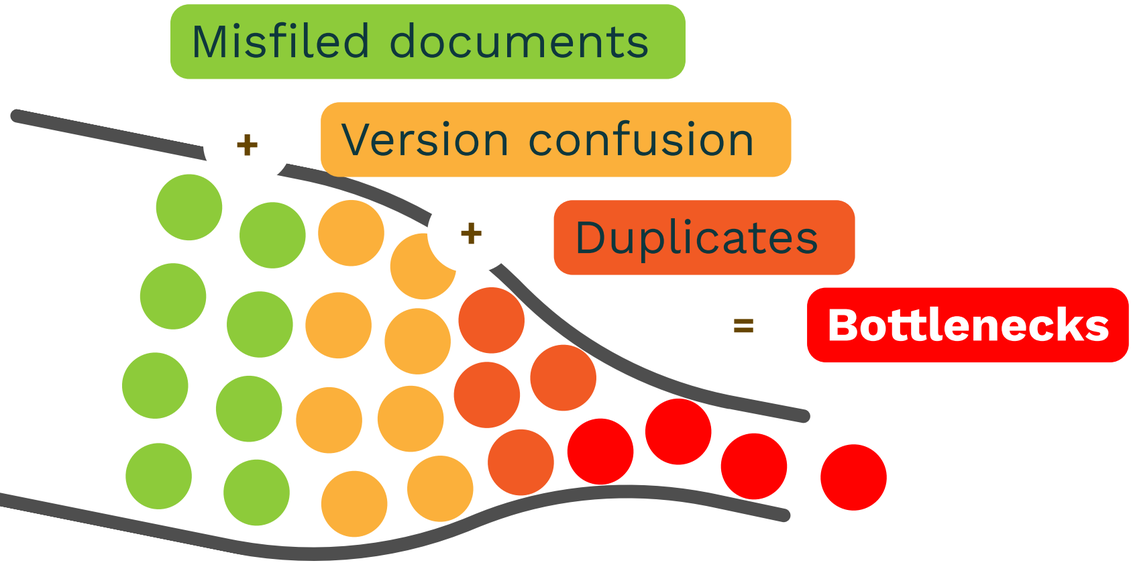


Static, generic organizers overwhelm clients

Reducing Overwhelm and Cognitive Load

- Ask only for what's relevant, instead of overwhelming clients with long lists
- Break collection into manageable steps so progress feels achievable
- Use consistent organization so staff aren't deciding where things belong
- Reduce follow-ups by making requests clear, timely, and specific

Prep & Review



Manual assembly burns staff time



Prep & Review

Misfiled documents

\+ Version confusion

\+ Duplicates

= **Bottlenecks**

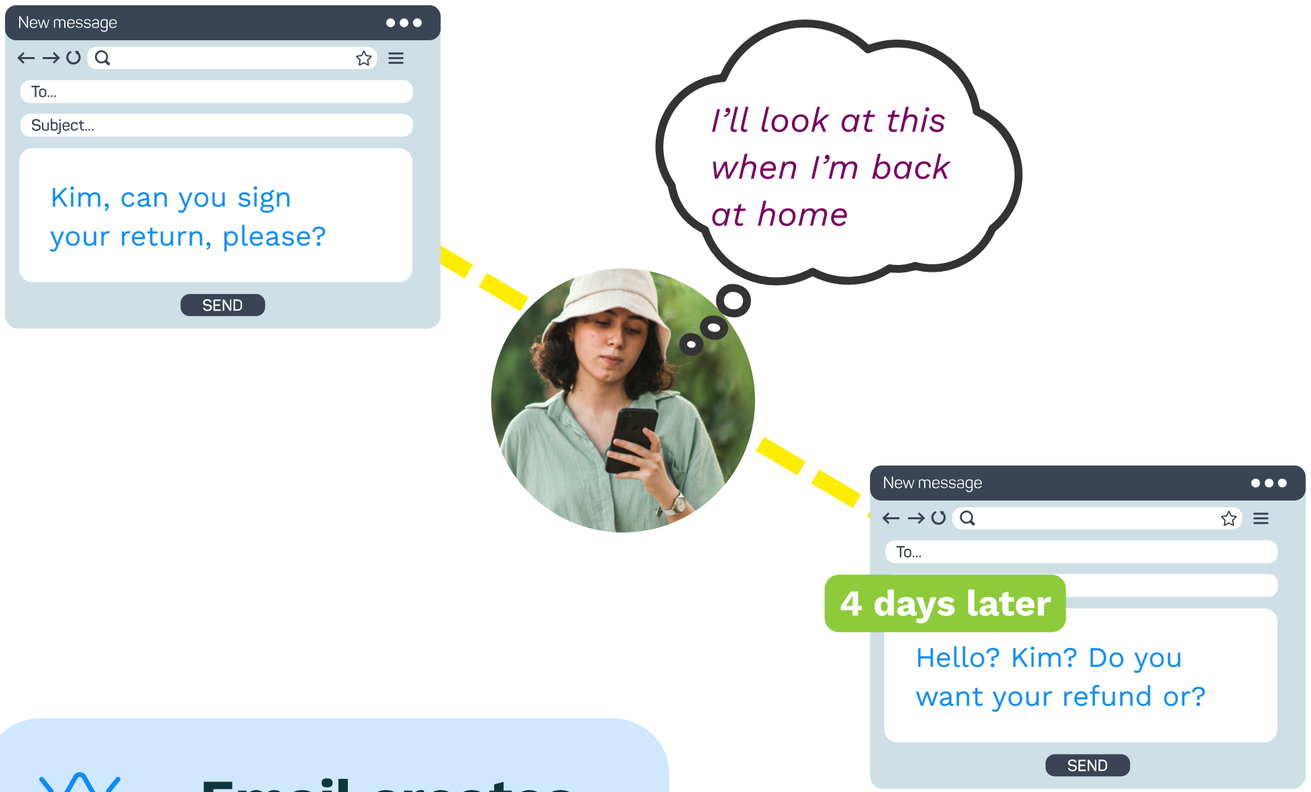
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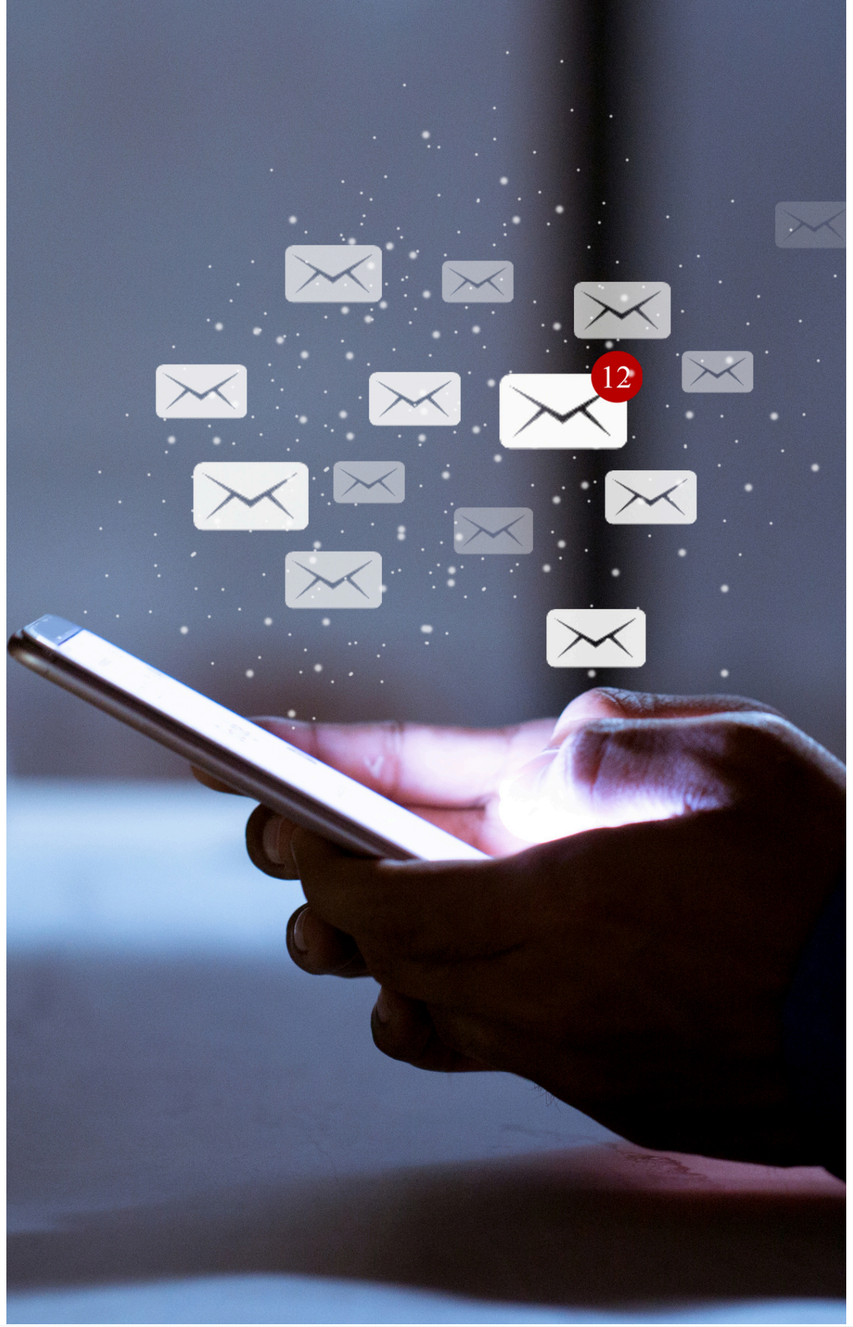
Reducing Decision Fatigue



- Create a single, predictable place where work and documents live
- Standardize naming conventions and file structures to eliminate guesswork
- Minimize handoffs that force staff to re-orient repeatedly
- Reduce rework by clarifying ownership and review expectations

Deliver

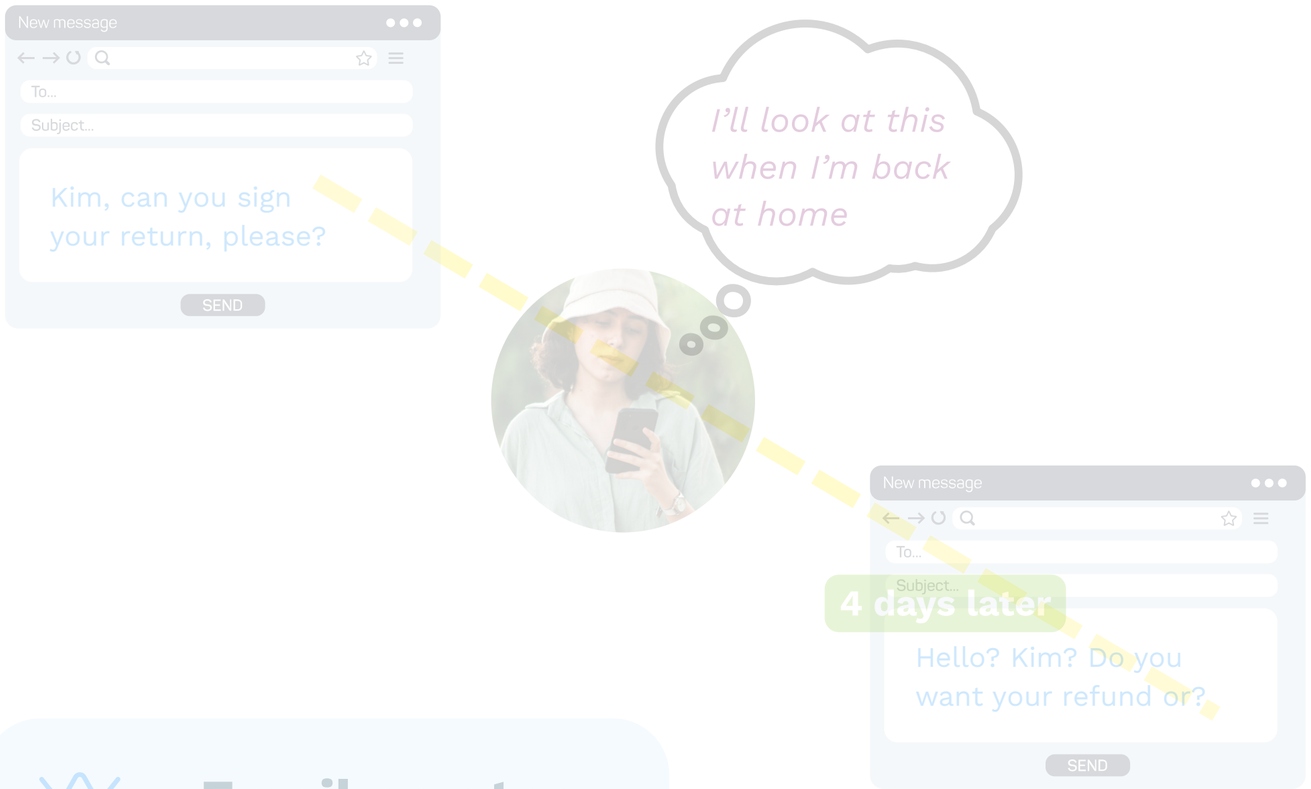




Email creates risks & delays

Engage
Collect
Prep & Review
Deliver
Archive

Deliver



Email creates risks & delays

Making Delivery Calm and Predictable

- Use one clear, consistent delivery process for all clients
- Make it obvious what's complete, what's pending, and what's required next
- Reduce reliance on inboxes and individual staff memory
- Close engagements cleanly so nothing lingers unresolved

Archive

Often forgotten until it’s urgent

√FACT

Firms that don’t meet FTC Safeguards & IRS 4557 requirements have **major security risks *and* can face penalties.**



Archive

Often forgotten until it’s urgent

√FACT

Firms that don’t meet FTC Safeguards & IRS 4557 requirements have **major security risks *and* can face penalties.**



Reducing Risk and Lingering Stress

- Treat archiving as part of the workflow, not an *afterthought*
- Apply consistent retention and access rules across all clients
- Maintain clear audit trails to reduce compliance anxiety
- Protect both the firm and the client long after the return is filed

What Changes When Workflows are Intentional

Calmer, more predictable experiences support staff and clients



Key Takeaways for Reducing Friction

Simplify your stack
Fewer tools, fewer decisions

Source of Truth
One source for docs

Build Flex Foundation
Swap tools w/o chaos

Connect Each Stage
Leverage automation

Layer AI Safely
Save time, securely

Outcome: a practice that’s scalable, sustainable, and client-ready for what’s next

When Workflows Reduce Friction, Relationships Improve

Clear workflows change how clients show up:

- Clients know where to go, what's required, and what comes next
- Work feels easier for clients, not heavier
- Fewer follow-ups and less frustration on both sides

The result:

More trust, better collaboration, and less daily stress inside and outside the firm.



SmartVault

The document management and client portal that’s the center of your tech stack

Engage

Collect

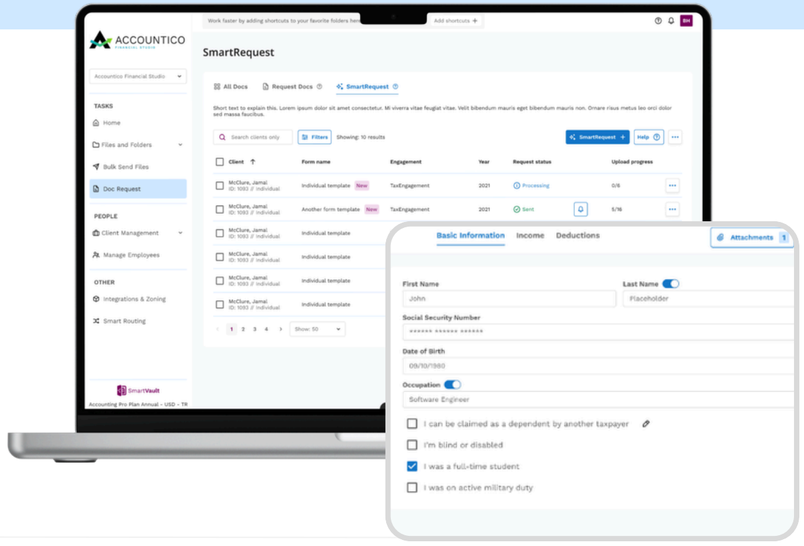
Prep & Review

Deliver

Archive

SmartVault anchors your firm in document management, connecting the tools, workflows, and people behind every step of tax prep — from engagement to archiving. The result? Work that feels exactly like it should: organized, secure, and seamless.

Firms that use SmartVault save 60-90 minutes per return.



The SmartVault Difference: **Built for the Tax Workflow**

Built for You
Intuitive platform with unlimited cloud storage, branded client portal, and guest user access tailored to your real-world needs

Proven and Reliable
Automated workflows and SOC 2 Type 2 Compliance increase productivity, help firms scale, and strengthen security

Centralized and Integrated
The only DMS that integrates with leading tax software, practice management systems, and much more with our Open API

Dedicated, Focused Care
From migration and setup to scaling, SmartVault's U.S.-based support and onboarding teams help you succeed.

15+ years

500M+ docs stored

3M+ users

SOC 2 Type 2 Compliant

Real firms. Real results.



Eric Green – Green & Sklarz LLC | Tax Rep Network

- **The Strategy: Automated client onboarding with smart folder templates and intelligent routing**
- Impact: Saved $150K/year in billable time; shifted hours to revenue work.
- Growth Enabler: Standardized onboarding firm-wide
- “One of the smartest technology decisions we've made to future-proof our firm.”



Dawn Brolin – Powerful Accounting

- **The Strategy: End-to-end automation of document requests, eSignatures, and folder organization**
- Impact: Freed hours weekly, eliminated paper, enabled true work-from-anywhere flexibility.
- Growth Enabler: Scaled without adding staff; elevated client experience with 24/7 self-service portal.
- “SmartVault is the backbone of our tech stack — it’s integral to scaling without adding staff.”

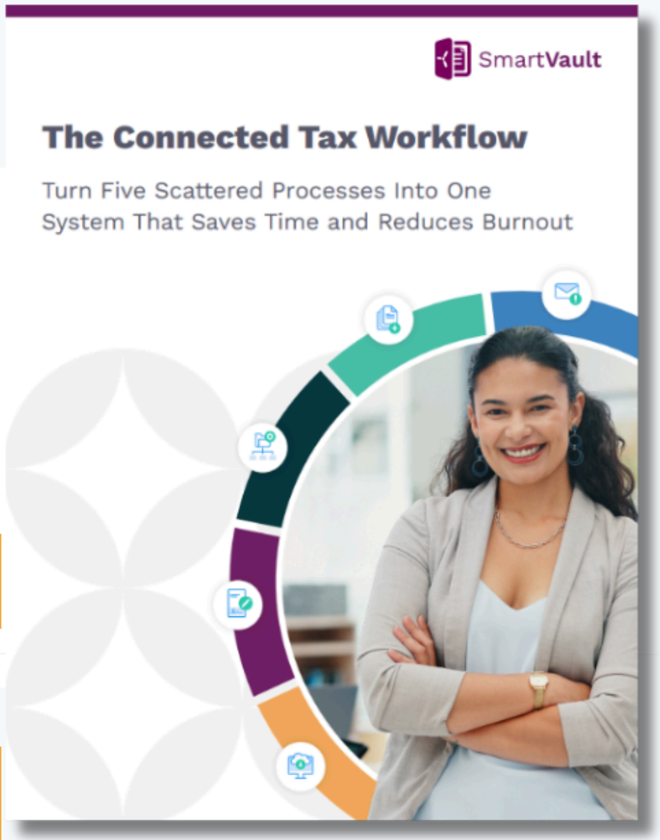


Nick Boscia – Boscia & Boscia PC | The Balanced CPA

- **The Strategy: Automated document intake with seamless tax and practice management tool integration**
- Impact: Doubled client base without increasing workload; firm ran smoothly during extended travel.
- Growth Enabler: Balanced work-life while expanding revenue capacity.
- “SmartVault made it possible to grow, serve more clients but work less hours, and live the life I want.”

Download Our Latest Resource

This guide shows you how leading firms eliminated busy season burnout by connecting engagement, collection, preparation, delivery, and archiving into a system where each stage actually makes the next one easier.



Polling Question

Would you like to learn more about SmartVault?

- Yes, I’d like a personalized demo.
- Not at this time.

Q&A

We’ll answer your questions submitted during the webinar.



Thank you for joining us!

Here’s to building a connected foundation that makes every tax season easier.

(866) 674-6785

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