

Peterson Sullivan Case Study

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In the Spring of 2016, the firm underwent a Lean process improvement project over their 1040 tax process and considered using SafeSend Returns to reduce the amount of paper shuffling involved in the process. But, fearing pushback from clients, they tabled implementation for a few months.

By the fall of that year, the firm realized their clients were asking for a way to sign Form 8879 online. They decided to do a demo with two partners. The two partners involved in the demonstration were really pleased with the results and started sharing it with others in the firm. By the last day of the filing season, word had spread that there was a better way.

Today, SafeSend Returns is the default method of delivering returns and collecting e-file authorizations for all 1040s and entity returns. Clients do have the option of opting out if they prefer to have their return mailed or sign in the office, but about 70 percent of 1040 clients are using it, and the firm pushes to bring more clients on board each year.

Jason Peyovich, Workflow Manager at Peterson Sullivan, says there were a few bugs to work out during the rollout, but the cPaperless team was quick to fix any issues that arose.

“We deal with a large number of software companies,” Peyovich says, but SafeSend Returns “seems more agile. They’re quick to fix issues and implement new features that the firm or the clients ask for. Some software companies seem to move at a snail’s pace, so it’s really nice that they’re so responsive.”

From a staff point of view, there’s a lot of excitement.

“It saves everyone a lot of time,” Peyovich says. “Seniors and managers especially like that it sends reminders for estimated tax payments, so they don’t have to send them, which is time-consuming.”

The firm estimates that it’s realized time savings of 30 to 35% on processing returns and countless hours that used to be spent chasing down 8879s. “The biggest difference we’ve noticed is that it’s not as crazy around deadlines,” Peyovich says. “We’re not contacting clients five times a day to get the 8879 in by the deadline. It frees up staff to work on other things and just makes their lives easier.”

Peyovich says much of the client resistance they initially anticipated hasn't materialized or has been overcome. Peyovich spoke to several clients who had issues or questions. In most cases, he found that educating clients on the benefits and security helped overcome resistance.

"We've received a ton of emails from clients saying it's a great tool and they're glad we're using it," Peyovich says. "They tell us they e-sign stuff online in other areas of their lives. They'd just been waiting to be able to do that."



Jason Peyovich
Workflow Manager, Peterson Sullivan