



Sikich LLP Case Study

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During a Lean process improvement project, the firm realized they were spending a lot of time and energy assisting clients with portals and tracking down Forms 8879. For returns that were mailed, the cost of postage kept increasing, and delivery was unreliable. Even worse, clients regarded paper returns as a nuisance. Jerry Schmit, a partner on Sikich's tax team, heard about SafeSend Returns and says he knew "that simple solution is what we need."

After testing out SafeSend Returns with select clients in the Fall of 2016, the firm rolled it out to all 1040 clients as the preferred method for delivering returns and collecting signed Forms 8879. As soon as people used it for 1040s, they started asking when they could use it for business returns. Sikich hasn't officially announced SafeSend Returns as the preferred method for delivering business returns, but its use has grown organically.

Schmit says the favorite feature for most business clients using SafeSend returns is the electronic K-1 distribution because either the firm or the client can enter email addresses for all partners and shareholders and have K-1s delivered electronically.

Schmit says they work with one client who has 20 to 30 returns and works with other CPA firms to prepare some of them. "They've told us this is far and away the best K-1 delivery system," Schmit says. "Another firm they work with sends K-1s via portals. The client has no control over it. They don't know if and when the K-1s are delivered."

The firm found that good communication with clients ahead of time is key for getting them on board. They approach clients proactively, share the positives and show clients a two-minute video.

"We still have a small pocket of clients that don't use it, but for the majority, electronic delivery is a non-factor. They're used to getting everything electronically in other areas of their life."

Schmit says clients like not having to sign into a portal and being able to sign e-file authorizations on their phone from wherever they're at. He says the typical response from most clients is, "Wow, that was really easy."





Employees are happy with SafeSend Returns, too. "Our admin team loves it," Schmit says. "They can process a return in five minutes, so it saves them a lot of time. Even people who were hesitant, when they started using it, realized they got 8879s much more quickly. It really cuts down on work and follow-up later on."

In fact, the same busy season that Sikich rolled out SafeSend Returns as the preferred method for delivering 1040s, they turned additional responsibilities over to their admin team. "They were worried they wouldn't have time to take on more responsibilities," Schmit says. "I told them to just give it a try because I thought they'd save a lot of time on processing. I was right. SafeSend Returns freed up significant amounts of time."

SafeSend Returns estimates that using SafeSend Returns cuts the time for assembly and delivery of 1040 returns from 15 to 30 minutes or longer, down to just four or five minutes, on average. Schmit says this is consistent with their findings.

That time savings has helped the firm push more of the administrative tasks that were being handled by professionals onto the admin team. Schmit says the professionals can now concentrate more on value-added work for their clients.

"SafeSend Returns gave us a simple solution to what was a convoluted process," Schmit says. "There is genius in the simple things."



Jerry Schmit
Partner, Sikich LLP