



SafeSend
Returns™

BOOMER
CONSULTING, INC.

Guide to
**USING LEAN SIX SIGMA
TO MAKE SOFTWARE
DECISIONS**

2020 Update

A BOOMER ADVANTAGE GUIDE

2020 Update

This guide provides additional information and insights to the prior *Guide to Using Lean Six Sigma to Make Software Decisions*. In the previous *Guide*, we outlined the opportunities accounting firms have to automate their compliance practices while strengthening client relationships and provided advice on what firms can do to capitalize on this opportunity. If you haven't yet checked it out, we welcome you to download the previous edition, which includes inspiring stories from firms who have leveraged Lean Six Sigma and innovative technologies to provide their services faster, cheaper, better and easier!

In this guide, we've supplemented our previous literature with a case study from Honkamp Kruger & Co., PC, an accounting and business consulting firm that has been using SafeSend Returns for five years.

We've also included Honkamp Kruger's ROI study, showing the amount they were able to save per return and firmwide, by making the switch from paper to SafeSend Returns. While your firm's unique processes and numbers may differ from those we've included, we believe it's an excellent illustration of how any firm can leverage cutting-edge technology, automation and improved processes to maximize value and minimize waste.



Case Study



Honkamp Krueger is a Top 100 CPA and business consulting firm in the U.S. The firm serves client organizations in all 50 states and thousands of U.S. cities. Their clients include privately-held organizations, Fortune 500 multi-nationals, franchisor organizations across all industry sectors, government agencies, individuals, and nonprofit organizations.

Honkamp Krueger (HK) began using SafeSend Returns in 2015 after Tiffany Roussel, the firm's Business Application Manager, was introduced to the software at an industry conference.

Roussel says the firm was initially drawn to SafeSend returns for electronic delivery of tax returns and liked that they could visualize an assembled return on the screen. "As we started looking into it, getting the 8879s was even more intriguing," Roussel says.



"We saw the value right off the bat."

Tiffany Roussel
Tax Administrative
Supervisor

Then the firm discovered SafeSend Returns could also be used for distribution of K-1s to partners and shareholders. "We have a lot of returns with multiple shareholders, and we knew clients would find that valuable," Roussel says. "We saw the value in that right off the bat."

To convince firm leaders of the potential, Roussel presented a summary to HK's executive team. They didn't just compare paper delivery to electronic delivery, but considered tangible and intangible benefits, including:

- The cost of paper and postage for printed tax returns
- Binders, tabs and other supplies for the client copy of tax returns
- Postage-paid return envelopes for Form 8879 and estimated payments
- Time associated with assembling returns, partner review, and chasing down 8879s
- Time spent sending estimated payment vouchers throughout the year

Roussel says the firm estimated they were spending roughly \$45 per tax return for paper delivery, so the return on investment made SafeSend Returns a no-brainer.





HK began with a test group made up of 150 employee tax returns. “This was a good test group,” Roussel says, “because they would eventually be the end-users.” The firm also liked the idea of working out any kinks on employee returns before using the product with clients. However, the initial rollout went very well.

Today, HK uses SafeSend Returns on roughly 35% of the firm’s tax returns, but the firm is pushing to grow that number.

“It’s fair to say that SafeSend Returns cuts turnaround time in half from the date delivered to date filed.”

Roussel has a passion for tracking data surrounding the firm’s technology, and says the firm’s turnaround time from the date a return is delivered to signed in SafeSend Returns averages 2.67 days, and their turnaround time for e-filing from there is within one day. For a paper-assembled return where the 8879s are mailed, the turnaround time is six days.

“It’s fair to say that SafeSend Returns cuts turnaround time in half from the date delivered to date filed,” Roussel says. “Gut feelings and opinions are one thing, but the data is inarguable.”

HK has always been an early adopter of technology and likes the idea that they can help tailor the development of technologies like SafeSend Returns. Over the past five years, HK has provided feedback on functionality and has seen many of those suggestions implemented.

“Our experience with SafeSend Returns is it’s always a changing and growing product,” Roussel says. “As requirements change, they’re changing along with them, taking feedback and responding to it. Their customer support has been quick – we don’t always get support like that from other vendors.”

“We’re not only getting the return right but giving them options and showing that we’re innovative.”

“There is some fear internally of just pulling the trigger and requiring it across the board,” Roussel says, “But most people nowadays get everything electronically. The clients who struggle with adoption are struggling everywhere.”

Still, among the clients who are using SafeSend Returns, HK has received great feedback.

“We have clients from all over the U.S. and abroad,” Roussel says, “so it’s nice to be able to get them a quick copy of their tax return and collect their signature. When we can turn work around and get things out the door quicker, that improves client satisfaction. We’re not only getting the return right but giving them options and showing that we’re innovative.”

How much time and money is your firm losing each year sending paper returns?

Honkamp Krueger performed an in-depth ROI calculation to quantify the amount the firm saves by using SafeSend Returns. Here is a look at their numbers.

TRADITIONAL PAPER PROCESS

Description	Price Per Return	Total for 1,500 Returns
Binding	2.42	3,630.00
Tabs (Federal, State, Estimates)	1.25	1,875.00
Fasteners	0.27	405.00
Tax Records Envelope	0.30	450.00
Tyvek Envelope	0.30	450.00
Paper, Toner & Printing	0.02	30.00
Postage	7.00	10,500.00
Mailing Labels	0.03	45.00
Sign Here Stickers	0.40	600.00
Return Envelopes (Postage Paid)	0.10	150.00
Printing/Collation/Assembly	3.33	4,995.00
Mail Room/Delivery	3.40	5,100.00
Re-Process Corrected Returns	3.14	4,710.00
Email Instructions to PDF Clients	3.00	4,500.00
Partner Review/Physical Handling of Return	10.63	15,945.00
Tracking 8879's	3.00	4,500.00
8879 Followups and Reminders	3.00	4,500.00
Opening Envelopes & Scanning Paper 8879s	2.66	3,990.00
Voucher Management & Reminders	3.00	4,500.00
Total	\$47.25	\$70,875.00

SAFESEND RETURNS PROCESS

Description	Price Per Return	Total for 1,500 Returns
Price	13.50	20,250.00
Labor – Estimated Admin Time	2.08	3,120.00
Total	\$15.58	\$23,370.00

Savings Per Return: \$31.67
Annual Savings with SafeSend Returns: \$47,505

Of course, other benefits can't be converted to monetary values, but are still an essential part of a firm's return on investment. Honkamp Krueger identified the following intangible benefits of using SafeSend Returns:

- ✓ Client experience: faster, more efficient, and less frustration
- ✓ Increased staff morale
- ✓ Modernized firm appearance: using the latest technology
- ✓ Remote and mobile compatibility for firm and clients



About

About Boomer Consulting, Inc.

Boomer Consulting, Inc. provides communities, consulting and training to hundreds of the highest performing CPA firms. Our unique and powerful solutions target five areas critical to a firm's success: Leadership, Talent, Technology, Process and Growth.



About SafeSend (cPaperless)

SafeSend (cPaperless) specializes in paperless tools that create efficiency in tax and accounting firms' daily workflow. The products allow accountants to document their digital workpapers (TicTie Calculate), to share encrypted files with clients (SafeSend) and to use an automated, centralized, and standardized way to automate assembly, delivery & eSign of tax returns digitally to their clients (SafeSend Returns).

Learn more by visiting www.safesend.com



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