



Friedman & Huey Associates LLP

Case Study

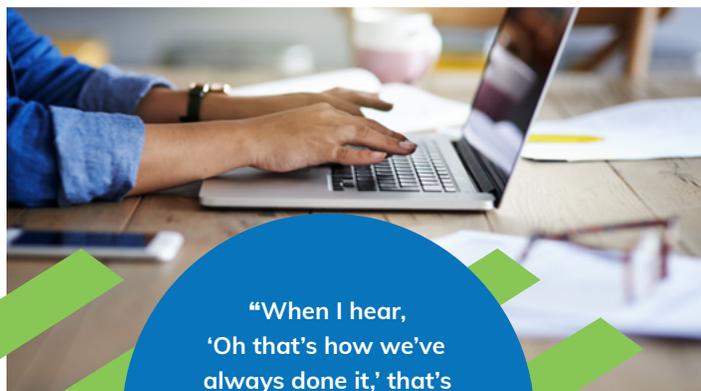


Leizel Acres, MST
Tax Supervisor

Friedman & Huey Associates LLP is a distinctive full service certified public accounting firm serving clients in most of the United States. With "large firm" expertise yet small firm responsiveness and fee structure, they are more than accountants and tax experts, they are consultants with an outstanding reputation earned by providing exceptional service since their founding in 1985.

Addressing Challenges

Last-minute frustrations, particularly close to deadlines, may be a familiar part of doing business for tax and accounting professionals, but Friedman & Huey isn't satisfied with status quo. They continually strive to innovate and improve their internal processes. The firm recognized one of the more cumbersome processes was the paper assembly procedure for tax returns. Simple 1040 returns alone were taking up to 30 minutes to print, assemble and staple – then there were postage costs.



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Looking for Ways to Innovate

They developed an innovation team to focus on merging automation processes with the accounting work. One of the innovation team members, Leizel Acres, a tax accountant at Friedman & Huey, attended a SafeSend Returns webinar and fell in love with the idea of the product. “I prepare and review tax returns, but I try to be on the innovation side, always looking for new, tech-savvy things,” Acres commented.

She shared the webinar with the innovation team. Around the same time, a group of Friedman & Huey partners returned from a conference and were excited about a great product they had seen called SafeSend Returns. That’s when the firm began to look deeper into SafeSend Returns and then Senior Manager of IT Services, Benji Kramer, attended the SurePrep Transform Conference where SafeSend was a co-sponsor. Together, the team saw all the benefits SafeSend Returns could provide for the firm.





Timing is Everything

When the Covid-19 pandemic temporarily stopped the world in March of 2020, the firm was met with an enormous dilemma. While they were able to email tax packages out, many clients did not have access to a printer or a scanner and were unable to print, complete the e-file forms, and scan them back to the firm.

"Honestly, I really do believe Covid accelerated the digital transformation in a positive way," said Acres. "It forced our team members to adapt to meet clients' needs." With technology in your hands, you can't do things the old-fashioned way. "When I hear, 'Oh that's how we've always done it,' that's not the right answer! It should always be, 'Oh, I haven't done it that way. Let's try it!'"

Though some staff had been hesitant in February with busy season coming up, the timing on implementing SafeSend Returns was a huge plus for Friedman & Huey. Because they had already been on the road to using SafeSend Returns just prior to the pandemic, it positioned them as a forward-thinking firm. Their clients were happy to have the digital option and were impressed that the firm was so prepared.

Sending & Receiving 8879s

Another hurdle the firm experienced was retrieving signed e-file forms from clients. Acres explained, "Getting the signed 8879s back was very time consuming and often you felt like you had to pressure or bombard the client to get those signed forms back because you can't technically push the button until you have that form!" Learning about the reminder feature in SafeSend Returns was a big win for Friedman & Huey. Now reminders are sent automatically and signed 8879s are received in a timely manner. Acres commented, "There were times when all people were doing that last week before the deadline was following up with clients to get those signed forms back! Now it is super quick."

By demonstrating SafeSend Returns, any partners who may have been hesitant about using the platform because they believed their clients weren't going to figure it out, quickly realized that this was the easiest and fastest way to get the tax return to the client and get that signed authorization form back.



"SafeSend Returns has standardized how returns go through the assembly process."

Streamlining Processes & Standardizing Workflow

SafeSend Returns has had a positive impact on workflow firmwide. With multiple locations throughout the Chicago area, there were many variations on the "last mile" of the tax return engagement which made the paper assembly and delivery process confusing. Partners and tax preparers had personal preferences on which pages should be included and which should not. Even the way the admin team received the prepared return varied. Some people would print the paper return and drop it off, others would email the file. This led to inconsistencies throughout the firm.

"SafeSend Returns has standardized how returns go through the assembly process," said Acres. Putting in place one specific process was a way to eliminate those inconsistencies and standardize the workflow. Now, to get a tax return assembled and out the door, everyone follows the same procedure across partners, tax preparers, and admins throughout all three of their locations.

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“If anything, with SafeSend Returns it’s easier; some of them just love it, zip, zip they fly right through it, no problem.”

Saving Time on a Grand Scale

One of the most tangible benefits of everyone in the firm using SafeSend Returns is time savings. Prior to SafeSend Returns, a simple 1040 return could take up to 30 minutes for an admin to go through all the pages, print, and assemble everything. On larger returns such as trust returns with a lot of beneficiaries, or large multi-state 1040s, admins spent an hour to an hour and a half making sure that it was right.

With an excellent reputation for outstanding client services, Friedman & Huey realized that in their clients’ eyes, the tax return was the one tangible thing they presented, so they strive for perfection and an outstanding client experience when receiving the return. Automation with SafeSend Returns streamlined the process no matter the size of the tax return and removed the chance for human error. The intuitive, guided interface made it easy for clients to review their tax package and the reduction in processing time – hours into minutes - has been incredible for the firm.

Acres commented, “Now, all returns, no matter the size, take 5 minutes. Our assembly team loves SafeSend Returns. Year to date including 2019 tax year and so far in 2020 we’ve processed roughly 1,400 returns. If we save a minimum of 25 minutes per return, that equals 35,000 minutes or 583 hours!”

Increasing Client & Employee Retention

SafeSend Returns has given back Friedman & Huey’s team members hours each week to spend with their families. At a time when family is so important, everyone is looking for those extra hours to connect on a personal level. The firm is pleased at the amount of time that SafeSend Returns has saved their administrative team - allowing them to spend time with their loved ones or take on more exciting projects at work.

Not only is it a morale boost, it supports employee retention because the administrative team sees this investment in them and their well-being.

The firm also believes that SafeSend Returns helps client retention, since clients see them as forward-thinking. SafeSend Returns has been a positive experience for clients of every age. “We have a very large clientele of elderly clients. Sure, I’ve had some phone calls with 90-year-olds, walking them through the process. However, they only failed KBA because they can’t remember one of their previous addresses, nothing to do with the actual software! It’s not often I hear complaints from clients on it.” Acres continued, “If anything, with SafeSend Returns it’s easier; some of them just love it, zip, zip they fly right through it, no problem.”





Anticipating More Time Savings

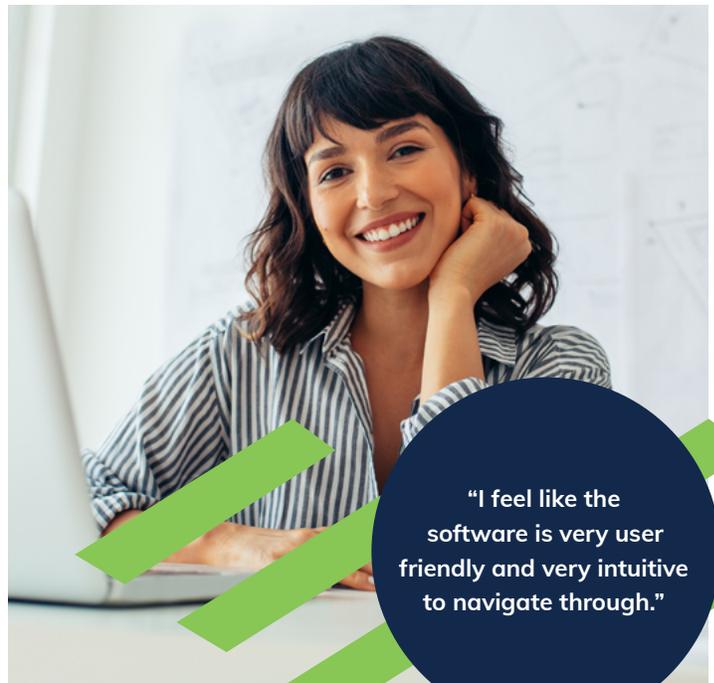
One pain point that the firm had to contend with was the wet signature the IRS required on POAs. Previously at the firm they had to send the form to the client, get it signed, collect the signed form, have the partner or the CPA sign it, fax it to the IRS, and wait for them to process it. Now the IRS accepts digital signatures on POAs and has a new portal where signed returns can be uploaded. “When you upload a POA, the signed return must be a digitized signature with an electronic record. SafeSend Returns provides that,” says Acres. “I’m really looking forward to utilizing that option with our firm. Most of our returns are on extension and are going out this fall. I anticipate attaching the POAs to the returns so when we send the return out, we can have them sign their POA, too.”

Sending Grouped Returns

One of the SafeSend Returns features Friedman & Huey is looking forward to using this coming tax season is grouped returns. The firm prepares a variety of returns for high-net-worth families, and they know this option will really be a benefit. It’s frustrating for a client to receive a separate email for each return.

“We didn’t want that one individual who signs 20-plus returns to get 20 different emails and go through the process 20 different times. Now SafeSend Returns has what I like to call, “the family office feature” for grouped returns. Using this feature, the client can receive one email, one link, and they can access and sign all of their returns,” Acres explained. This had been a concern and was something the firm pointed out to their Customer Success Manager at SafeSend. “For SafeSend to hear that suggestion from us and do something to remedy it so we can now send one set of grouped returns is a very positive experience,” said Acres.

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Listening, Helping, Serving

When an issue arises, the firm knows that SafeSend listens and responds. “We can tell that our feedback is being heard. It’s a testament to SafeSend and a way in which we’ve seen them invest in their customers,” Acres said. She went on to give another specific example, “When the group returns feature came out it was labeled ‘Controller Dashboard’ which seemed misleading because the person receiving the return may not always have the title of controller. We voiced our concern, and I noticed yesterday in the refresher training that it now said, ‘Tax Return Dashboard.’ So, we always feel like our voice is heard.”

SafeSend Returns has a 99.9 percent up time, with very minimal interruption. “I’m always notified if an issue arises, and I can notify the team. It’s always resolved quickly.” Acres noted that when it’s close to the deadline, every single software they have always has down time. “When you have tons of users on your platform, it gets to be a lot. It’s great that SafeSend’s service outages are minimal.”

Implementation, even so close to busy season, was a positive experience for Friedman & Huey; the support from SafeSend’s customer service teams is something the firm notices throughout the year. “I feel like the software is very user friendly and very intuitive to navigate through,” Acres commented. “SafeSend provides so many training materials. There are user guides, refresher trainings, awareness flyers, as well as informative pieces SafeSend has already created that we can simply add our logo to and send out to our clients. It’s all amazing.” The firm has had an all-around positive experience with the whole SafeSend team from the sales process and software onboarding to regular communications with their Customer Success Manager.

Acres summarized, “SafeSend Returns has really helped change the digital mindset of the staff and clients. It automated and standardized an inconsistent process in our firm. Because of that, it saved our administrative team hundreds of hours. We definitely recommend SafeSend.” ●●●●●

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at safesend.com**