



Now Hiring: Overcoming Staffing Challenges in Your Firm

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The tax and accounting profession is trendy. Yes, that's right; but unfortunately, what's trending is staffing shortages – and it's creating very real challenges for firms nationwide.

Challenges in the Tax and Accounting Industry

According to Forbes, the hardest hit industries are transportation, manufacturing and construction. But the tax and accounting profession is certainly feeling the effects of “The Great Resignation.” CPA Trendlines reports that, “about 64 percent of firms are seeking to add additional staffers, even as 60 percent of firms are turning away new work due to the crippling shortage of new hands.”

The current lack of candidates is challenging but the responsibilities of firms don't change. Tax returns still need to be completed and filed. So, what does this mean for firms? And what solutions are available to help address the accountant shortage as the next busy season approaches?

Less Staff, Same Workload

Extended deadlines may have eased some of the burden by allowing firms to spread the workload over a few more months. However, the same amount of work still needs to be done in order to file taxes, so this temporary fix does little other than kicking the can further down the road. How can your firm accomplish the same amount of work with fewer hands on deck?

One solution is to take on less work; a solution that 60% of firms have resorted to recently. But turning away new business due to staffing shortage does little for your firm in the long run. Growing your business is what keeps firms moving forward.

Automating processes that account for the most manual labor is one way to free up time for your staff and to do more – efficiently and effectively – in the same or less time. With automation, you can retain the talent that you have by eliminating some of the tedious tasks from the list of staff responsibilities and significantly lighten their load.

While finding qualified and skilled candidates can be a challenge in today's job market, creating an environment that is conducive to retaining the talent you already have is important as well. Everyone, including your current staff, wants to feel valued. Overworking your staff is not moving in the right direction.

Dependable staff members stepping up to help fill in gaps is a scenario that has become commonplace. But when temporary added responsibilities become permanent ones, firms run the risk of burning out those loyal professionals who are pulling together to get the job done. When there is no light at the end of the tunnel, the passionate fire that burns within the firm's best-and-brightest is in jeopardy of being extinguished. Putting automation solutions in place to reduce some of the burden not only frees up time, but it is an investment in firm staff. It shows that they are valued and that their well-being is important.



Essential Yet Labor-Intensive

Some of the most essential tasks in the tax engagement are also the most labor-intensive.

The Client Organizer

Printing and mailing out client organizers are monumental tasks that require reams of paper; boxes of envelopes; hundreds of hours to print, stuff and address envelopes; not to mention postage costs and hours of manual work. The second wave of intensive labor occurs when those organizers come back. The time it takes to scan in the returned source documents can feel like a never-ending task.

Multiple Reminder Calls for Unreturned Documents

Calling clients may give your firm an opportunity to make a personal connection. But as deadlines approach and documents remain outstanding, client calls can feel less like connections and more like hounding. Not to mention multiple follow-up calls eating up time in staff members' days. Multiply those follow-up calls by 10, 50, even 100's of clients and the result is frazzled admins who still have other tasks to address as well as plenty of documents that have yet to be returned.

Tracking Down Unsigned E-File Forms

Knowing which clients have returned their e-file forms and which are still outstanding can become a tracking logistics nightmare. Keeping all the information in one place, accessible for all, and updated in real time is ideal, but tracking this information along with client calls and emails to track down outstanding forms can be staggering.



Replace the Clutter and Bottlenecks with Streamlined Systems

Keeping track of multiple solutions can be exhausting for staff. Juggling documents that need to be scanned or printed and organized can make them feel like a circus act rather than a tax and accounting professional. Receiving information and communication from multiple solutions can become confusing for clients.

What if you could save your staff time while standardizing processes with a single source for automating everything from organizers to extensions and every step throughout the tax engagement? How much more could they accomplish with automation built around assembly, delivery, and e-sign, that ensured clients always experience familiar communications?

Could your firm's administrative team benefit from the ability to send an 8879 with the tax package, or as a one-off document outside the tax package, in the same familiar platform? Would they miss dragging and dropping e-sign boxes onto each area that requires a signature if you had an automation solution that automatically read the tax return PDF and created writable areas for e-signature – eliminating the chance of human error in the process?



Just imagine your clients' reaction to a single solution that is easily recognizable; one where the instructions are direct and intuitive, whether it is a request for source documents, a delivered engagement letter, a tax return for review and e-sign, or another document requiring attention such as a POA or K-1?

More Benefits of Single Solution Automation

Standardizing inconsistencies around the assembly and delivery of the tax return helps alleviate the pressure on your staff of having to remember multiple ways to complete the same task. With a single source automation solution, the risk of your firm's e-sign request going to your clients' spam box is reduced because the communications from your firm come from the same, familiar email address throughout the entire tax engagement.

Staff no longer have to send business tax returns and personal tax returns separately. Nor do they need to utilize multiple tools to process them. It can be tedious for staff to remember which returns have to be printed, signed, scanned, and returned as well as which returns are an e-sign process. Single solution automation streamlines that process and can also group the returns together so that a client receives both business and personal returns in one transmission.

The Gift of More with Less

The staffing shortage is having a negative impact, but tax automation solutions can not only help the tax and accounting industry weather the storm but thrive despite it. The SafeSend Suite, featuring the award-winning SafeSend Returns, is a single-source automation platform that addresses the pain points your staff feels at every client touchpoint across the tax engagement life cycle.

"I just want to thank you so much because the SafeSend Suite has really solved so many pain points of our firm over the last couple of years. You just keep building on it and improving. You're amazing!"

- Cheryl Papay, Sax LLP

Staff love how much time is saved by taking the manual labor out of assembling, delivering, collecting e-signatures, sending reminders, providing payment vouchers, reporting and tracking on client activity, and K-1 distribution of business and trust returns. And the straightforward, intuitive process will be appreciated by clients as they review and sign documents throughout every step of the tax engagement utilizing their desktop, tablet, or mobile device.

About the SafeSend Suite™

The SafeSend Suite platform offers powerful functionality to tax and accounting professionals to address every client touch point across the tax engagement. Automate the manual tasks often associated with the back and forth of client communication through each season of the tax year!

- Engagement Letters – SafeSend Signatures™
- Client Organizers – SafeSend Organizers™
- Assemble & Delivery – SafeSend Returns®
- Extensions – SafeSend Extensions™

At the core of the suite, SafeSend Returns is a multi-year winner of the CPA Practice Advisor Technology Innovation Award. SafeSend Returns eliminates the manual, labor-intensive elements many tax departments experience producing client-ready tax returns.

Visit safesend.com to learn more about automating your tax engagement workflow and schedule a demo! ●●●●



About SafeSend

SafeSend's mission is to automate the tax and accounting profession with innovative, emerging technologies that help practitioners work more efficiently and serve their clients better. Progressive accounting firms and tax professionals rely on our unique and robust solutions to make their lives easier and their work more enjoyable.

SafeSend offers several foundational technology solutions for the tax and accounting profession. Our flagship offering, **SafeSend Returns®** is a multi-year winner of the CPA Practice Advisor Technology Innovation Award and has redefined the way accounting firms digitally assemble, securely deliver, and quickly capture e-signatures from clients for completed tax return packages. Additional tools we offer include, **TicTie Calculate®**, an Adobe® Acrobat® plug-in for accounting professionals, and **SafeSend Exchange™**, the secure, bi-directional file exchange system.

Visit safesend.com to learn more about our digital solutions. ●●●●

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