Robert W. Morris & Company P.C.
Case Study

Rob Morris
President

Gina Johnson
Chief of Staff

Robert W. Morris & Company P.C., headquartered near Harrisburg, PA, is a family business established in 1981. The firm's mission is to serve their clients with the right tools and knowledge to help them succeed. They treat their clients like family and provide unequaled support with a commitment to professionalism, courtesy, and excellence.

Multiple Locations, Multiple Processes, Multiple Challenges

"We have multiple locations, and we operate a virtual practice. That in itself presents some unique challenges," said Robert W. Morris & Company, President, Rob Morris. "We were at a place where we were delivering our tax product on paper and three or four different ways electronically. We needed to streamline our processes."

As Robert W. Morris & Company, Chief of Staff, Gina Johnson, recalled, "I came from more of an administrative function before I moved into my current role, so I had first-hand experience with the old process. It was a lot of paper, a lot of moving parts."

The presence of numerous processes placed a lot of stress on the administrative staff. Remembering all the steps in several different procedures wasn't just challenging for the existing staff, it made training anyone new extremely difficult.

In addition to the multiple processes used by the firm to deliver tax returns, they found themselves at a staffing crossroads, needing to manage the array of processes they had in place. "We had to make some decisions," Morris said.

The firm was introduced to SafeSend through Rootworks. As Morris explained, "We're a Rootworks member firm. We watched a couple of webinars that they presented, and SafeSend was our best option." ●●●●

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SafeSend Suite

Robert W. Morris & Company P.C.
CERTIFIED PUBLIC ACCOUNTANTS

Transforming Traditional Systems

Often, just the thought of moving to a new system is daunting, but the transition to SafeSend was a smooth experience. "The implementation process with SafeSend was very clean," Morris said. "It was laid out well and they held our hand throughout the entire process. It couldn't have been better. Our firm is always looking to provide a good onboarding process for our clients; we've actually stolen some of the ideas that we've experienced from SafeSend!"

Johnson agreed that SafeSend provided a simple, straightforward implementation. "It was a very seamless process," she said. "It was less work on our end because there's so much in terms of training and documentation already laid out for us." The personalized guidance they received meant they never felt pressured to figure out the SafeSend Suite platform on their own.

The firm noticed an immediate impact with the transformation from their traditional tech stack of systems to the SafeSend Suite®. "SafeSend came along and revolutionized this process for us," Morris said.

"It was a huge, huge help this past year," Johnson said. "We didn't have to have as many administrative staff members. It was a breath of fresh air for the administrative team as a whole because they were able to get through returns so quickly. Rather than taking so many steps to do one return, it was just SafeSend, one step, done."

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Pronounced Productivity Improvement

Numerous factors can impact productivity in a firm. While not everyone may be able to pinpoint the exact causes of delays, the entire team at Robert W. Morris & Company P.C. noticed a significant difference with a streamlined process.

"The SafeSend Suite had a big impact on our tax department workflow," Morris said. "It's not just the preparers, but the admins. We were able to do tax season with one less admin."

Morris said the firm experienced consistent, reliable productivity with the SafeSend Suite. "The nice thing about automating is that automation doesn't give you problems. The automation doesn't call off or something like that. So, as a part of that workflow, we were able to streamline the number of ways we deliver our tax returns. **We went from three or four electronic methods of delivery to just one very clean, streamlined process.**"

"Absolutely," Johnson agreed. "The SafeSend Suite allowed us to do things at a much quicker pace. We were able to push out more returns at a time, rather than before when it was a multiple-step process. It's a single step, and **it allowed more work to get out the door**." ●●●●

SafeSend Suite

A Simple, Positive Client Experience

Streamlining processes for the firm was important, but elevating the client experience was equally crucial for Morris. "The experience for our clients compared to what we were using before is like night and day. We've received positive client feedback—pretty much only positive feedback—and we delivered over 1,300 tax returns via SafeSend this year. I think that's a pretty good gauge."

"We delivered over 1,300 tax returns via SafeSend this year."

Finding an automation solution that improves the process for both firm and client is a winning combination. Morris and Johnson have discovered that the new process places fewer burdens on their clients, which, in turn, provides them with a more positive experience.

"The SafeSend Suite is much more user-friendly than what we were using," Morris said. "The clients receive a simple email. They don't have to remember passwords and complicated login information, which alleviated a lot of calls to my staff and saved us time. It removed quite a bit of friction, so it was positive."

The firm noticed significantly fewer client issues with the SafeSend Suite. "Any pain points that may have come up were very easy to solve," Johnson said. "Compared to our prior process it wasn't painful at all for them."

Measuring the Impact

Determining the value of an investment is critical with any business decision. Morris emphasized the significance of that process and how it impacted his firm. "Anytime you make an investment in something, and you make a change, it's not just a monetary investment. It's a time investment because your staff must learn a new process."

He added, "You want to try to put a number on that. What's the savings? What's my return on the investment?

That's a challenging thing to do. In tax season, I think like most firms, we're all working hard. We're just trying to survive it. SafeSend helped us do that."

By utilizing the automation solutions in the SafeSend Suite, the firm saved time and money, experiencing a unique and desirable experience during the busiest time of year. "**We easily saved $17,000 to $20,000 in salary expenses**, and the time savings was significant. Also, the frustration and pain points that we didn't have because it worked so well—I don't know how you measure that other than I know I slept much better at night!"

Finding restful nights during the height of tax season isn't the typical narrative in the tax and accounting profession. "What's that worth?" Morris asked. "I mean when you're sleeping well during the busiest season because your processes are working well and your staff isn't complaining—you can't put a number on that other than..."

"Priceless!" Johnson chimed in. Morris smiled and nodded in agreement. She'd taken the words right out of his mouth.

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"We calculated this," Johnson continued. "Our prior process, start to finish, could be 15-20 minutes. With SafeSend, it was more like five minutes. Because of that 100% electronic process, it was seamless, so it took less time."

Saving 15 minutes per return across the 1,300 returns their firm sent out utilizing SafeSend Returns® saved the firm 325 hours. That equates to more than 40 full workdays—or eight weeks of work! ●●●●

SafeSend Suite

Smooth Implementation and Invaluable Support

The prospect of a lengthy and complex rollout associated with traditional tax software implementation can be daunting enough to deter firms from transitioning to a more efficient, streamlined system.

"The main reason we switched to SafeSend versus keeping what we already had in place was what we had in place just wasn't working. It was creating a significant amount of friction for my team, and I didn't know how we were going to get through tax season with what we had," Morris said. "We did have something that was kind of an industry standard, but we knew we had to make a change and that was the main reason we switched to SafeSend."

The staff at Robert W. Morris & Company experienced an implementation process with the SafeSend Suite that was not only a smooth transition, but one with unparalleled support along the way.

"The woman that we worked with at SafeSend reassured us that her main focus during tax season was to be there for us and she wasn't kidding," Johnson said. "Anytime that I had a problem or question, she responded right away. She definitely stuck to her word."

Johnson also found the SafeSend Support team to be invaluable and responsive, which kept processes running smoothly—even during the busiest time of the year. "The customer support team when we messaged them through SafeSend was always Johnny-on-the-spot. I really appreciated that because we don't have a lot of time during tax season. We want everything right now just to get it done." ●●●●

SafeSend Suite

Single Solution Simplifies Procedures, Reduces Mistakes

The more steps involved in a procedure, the greater the room for error. Even minor mistakes can have a negative impact on a firm's reputation. "In the past we were using multiple tools to gather electronic signatures and do tax return delivery," Morris said. "By switching to the SafeSend Suite we were able to eliminate a number of extra processes that we had to document and follow. It really enabled us to avoid confusion."

Streamlining processes adds clarity and creates a less chaotic environment. "If you're using three or four apps for the same type of thing, then you don't necessarily know where to look for the return signatures," Morris said of their prior procedures. "By switching to SafeSend we were able to eliminate that, and it really improved the quality of my teams.

"Having the single solution in the SafeSend Suite really elevated my team," continued Morris. They didn't have to stress about where things were located – 'What app are we going to use to send this contract,' or 'Are we using this web app for the e-signatures for Corp,' or 'We're using this app for individuals because of the KBA authentication.' It really streamlined our processes. Ultimately, **the SafeSend Suite saved us time and it reduced mistakes.**"

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In addition to time savings, employing a single solution as opposed to multiple platforms had a substantial positive impact on their admin staff's training process. "Training our admin staff on one process and one program is so much easier than trying to explain several different platforms and what each one does and why and you need to use it," Johnson said.

She went on to elaborate about eliminating the concerns staff previously faced due to the numerous steps in the old procedure. "For someone to who might be not comfortable with technology, SafeSend is much easier because it is all in one. There's no, 'OK, you're going to do this part here, but then you're going to go to this program and send this for signature there.'"

"We also now use the SafeSend Suite in place of some other web apps like Adobe® Acrobat® Sign. We use SafeSend Signatures to have our clients sign our contracts and other documents." Sending unlimited documents for signature at no additional charge has significantly reduced costs for the firm.

"Using multiple tools to deliver returns and gather signatures was seriously challenging," commented Johnson. "The SafeSend Suite is an all-in-one wonderful product! It's very easy for us, and it's also easy for the client to figure out. It's self-explanatory." ●●●●

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◎ **SafeSend Suite**

Works Seamlessly With the Firm's Tax Software

"We've been using UltraTax CS® for 20 years and we always felt that we had to use one of the Thomson Reuters® solutions for our tax return delivery, but that's not the case," Morris said. He went on to describe how well the SafeSend Suite integrates with UltraTax CS. "It's flawless. We were so pleased to find that SafeSend works seamlessly with UltraTax CS and some of the other Thomson Reuters apps. That was a real blessing in tax season because in tax season you don't have the opportunity to have things go wrong and SafeSend was seamless."

"We were so pleased to find that SafeSend works seamlessly with UltraTax CS."

Johnson agreed. "What Rob said was 100% true. SafeSend is a better product than what we were using." She believes when a firm is deciding on spending money on an app or new process, how the people from a company treat you makes a difference. "SafeSend did a great job in terms of their presentation of the product and explaining it. That gave us a level of comfort when choosing the SafeSend Suite and turning around how we do things right before tax season. That played a big part," said Johnson.

"I don't know what the culture is like at SafeSend," Morris said, "but the product is great and everybody we've dealt with has been fantastic."

Don't Delay, Start Today

When is the right time to implement the powerful tax automation solution offered by the SafeSend Suite platform? Robert W. Morris & Company P.C. began using the SafeSend Suite in January of 2022, and within just four months, they had already processed 62% of the firm's total returns through SafeSend.

Morris summarized his firm's experience this way: "The process with the SafeSend Suite is much simpler and it's easier for our clients to understand. We love our clients. So, the fact that SafeSend allows you to just put in one email for a married couple as opposed to having both emails in when you start—as silly as that sounds—that's actually a pretty big game changer. SafeSend is far superior.

"If a colleague was wondering if they should start using SafeSend now versus waiting until maybe a slower time, **I would tell them to start as soon as possible; start right away.** Tax season is an interesting time because there is no time! You just have to do it; you need to take that step. I know the time savings for us and the ease of implementation. I would do it again in a heartbeat. I would encourage them to start right away. I wouldn't give it a second thought."

Final Thoughts

Morris continued adamantly, "If a colleague was on the fence about whether to use SafeSend because they already have an e-signature solution, I would simply tell them that the SafeSend Suite is most likely going to be better. We've used two or three e-signature solutions before switching to SafeSend and they don't pass muster. SafeSend just blows them away, hands down." ●●●●

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About SafeSend®

SafeSend's mission is to solve real-world firm problems through innovative automation technologies. We help tax and accounting practitioners work more efficiently and serve their clients better, while making their lives easier and work more enjoyable.

SafeSend offers several foundational automation software solutions within the SafeSend Suite®. Our flagship product, SafeSend Returns®, is a multi-year winner of the CPA Practice Advisor Technology Innovation Award and has redefined the way accounting firms assemble, deliver, and capture e-signatures from clients for completed tax return packages.

Visit safesend.com to learn more about our technology solutions.

About the SafeSend Suite

The SafeSend Suite offers powerful functionality to tax and accounting professionals to help them automate all client touchpoints across the tax engagement journey. From initial outreach with engagement letters, questionnaires, and source document gathering to automating the completion of the engagement with tax return delivery and e-signing. The SafeSend Suite allows your firm to automate manual work and provide an intuitive, secure experience for your clients from getting "tax ready" to "finish & file."

- Engagement Letters – SafeSend Signatures™
- Tax Organizers – SafeSend Organizers™
- Tax Return Assembly & Delivery – SafeSend Returns®
- Secure File Exchange – SafeSend Exchange™
- Extensions – SafeSend Extensions™

At the core of the suite, SafeSend Returns, a multi-year winner of the CPA Practice Advisor Technology Innovation Award, eliminates the manual, labor-intensive tasks many tax departments experience during the assembly and delivery of client-ready tax returns.

Visit the SafeSend Suite page of our website to learn more about automating your tax engagement workflow and **schedule a demo!** ●●●●

For more information, visit safesend.com.

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