

Therrien & Associates, P.C.

Case Study



Lisa Goldbecker
Administrative Assistant

Therrien & Associates, P.C. is a boutique CPA firm specializing in high-income and high-net-worth clients in Fairfield County, CT.

Areas of expertise include: • High Income/Net Worth Tax Planning • Individual, Trusts & Estate Taxation • Fiduciary Services • Small Business Taxation and Management Consulting

The Problem with Paper

“When I came here we were doing everything with paper and I couldn’t stand it,” recalls Lisa Goldbecker, Administrative Assistant at Therrien & Associates, P.C. “My hands were getting all dried out assembling so many returns.” Between boxes of Band-Aids and bottles of lotion, Goldbecker began looking for an alternative to the firm’s paper process.

“We were trying to be conscious about the environment. So, I started researching products that would deliver an easy-to-use solution. We wanted something that was easy for us to use as well as for the client,” Goldbecker explained. She knew that simply because a product was helpful for the firm didn’t guarantee it would provide excellent customer satisfaction. “The last thing you want to do is give a client a difficult program to use because they’re just going to keep calling with questions,” said Goldbecker. “SafeSend Returns® was the answer.”

Simple and Straightforward

Keeping simplicity at the forefront of her mind, Goldbecker sought out a digital solution to her paper problems. “I researched different online programs and watched the videos. SafeSend was the easiest one for me to understand,” she explained. “Whenever I do research, I put myself in the client’s position.” Not all clients have the same level of comfort with technology, so Goldbecker kept that in mind as she conducted her search.

The ultimate goal was finding a program that reduced or replaced their paper processes, but she also put herself in the clients’ shoes. “I’m not the most computer-savvy person when it comes to using certain programs,” Goldbecker said. “So, I assume I’m someone who’s never used a computer or rarely uses one. If someone who can barely use a computer can figure it out – perfect; let’s use it. If it’s too complex for me, it’s definitely too complex for some of the clients.”

Looking through the lens of a client helped her to gain a fresh perspective. While watching informational videos on various options to replace paper processes, Goldbecker said, “I always had to watch videos a few times. With SafeSend Returns, I watched it once and I totally understood it after the first viewing.” Right then she knew SafeSend was the clear winner.



Implementation and Improvement

With the winning solution selected, Therrien's next step was implementation. The process was as simple and straightforward as the video she'd watched. "I called SafeSend and we set up an appointment," Goldbecker explained. "They sent us the information and helped us set up step-by-step. They were always available for questions, and they usually got back to us within 24 hours."

SafeSend was a young company when Therrien & Associates reached out to implement the automated solution provided in the flagship product, SafeSend Returns.

Since day one, SafeSend has made a point to listen to their customers and make improvements to help solve their pain points. "The SafeSend Returns program wasn't that complex yet," recalled Goldbecker. "Every year I kept sending more and more enhancement requests, and every year SafeSend would make it happen," she commented. "SafeSend is very open-minded and wants to continually improve."

Therrien & Associates hasn't found the same level of responsiveness with other programs they utilize. Goldbecker summarized the firm's experience, "SafeSend is the only program we use that when we send suggestions they get back to us and they want to find a way to improve the program. No other program we use does that."



Increased Workflow

Tax and accounting firms understand that paper processes were the norm for decades. Procedures, though tedious, were often honed down to a science. However, when you're dealing with printing, assembling, and delivering paper tax returns, there's a limit to how quickly the process can be completed.

"Before SafeSend, it was taking anywhere from 20 to 25 minutes to do a tax return. If you're doing over 500, that's quite a lot of time," remarked Goldbecker. "With SafeSend Returns, my workflow has increased beautifully. I no longer have to print out the return. The whole process went down to about 5 minutes."

Saving Therrien & Associates 20 minutes per tax return – 500 times over – gives them nearly 167 hours back that doesn't have to be spent getting paper cuts and dried-out hands! Going paperless with SafeSend Returns made such a difference in their firm, both in the environmental impact and the time savings, that they made SafeSend their firm standard.

"We're completely paperless except for a few clients that do not use the computer. Anyone that comes on board now has to use the SafeSend Suite™. That is one of the requirements when we onboard new clients. We're totally paperless," emphasized Goldbecker. "It's fine if you want to drop your tax documents off, but the end result is we're sending it through SafeSend Returns." ●●●●



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Efficient and Environmentally Friendly

Efficiency is very important to the firm and to Lisa Goldbecker personally. “I’m a person who believes in working more efficiently – working smarter, not harder,” she said. “We use SafeSend Returns because even if I send returns through the secure portal, I have to PDF the e-file forms and the vouchers, and again that goes back to spending 15 minutes on a return and it’s just too time-consuming.”

Providing a quality experience for their clients is also a high priority. When asked if she could put a number on the time, money, or client retention the SafeSend Suite has saved her firm, Goldbecker responded, “It’s priceless! That’s my answer, priceless.”

Cutting down on paper has also had a positive environmental impact. “People love the idea of SafeSend Returns because they don’t want paper; they’re tired of paper. They want to help with the environment, and this is the way to do it,”

Goldbecker explained. “I actually had to order paper the other day and it was over \$50 for a case of 10 reams of paper. We used to go through 40 cases of paper to do tax returns and now we’re down to about three cases.”

The Benefits of Anytime, Anywhere Access

There is a reason that SafeSend Returns is a multi-year CPA Innovation Award winner – and the fact that the core of the SafeSend Suite is so much more than an e-signature solution is a point that Goldbecker spoke to with enthusiasm. “When you’re doing a tax return and you have vouchers included, SafeSend Returns is the best product because you can sign it anywhere in the world.”

“A perfect example of that is clients who were traveling overseas when the pandemic hit and they were stuck on the cruise ship. They couldn’t get off. They couldn’t get to the port of call. No country would accept them,” Goldbecker explained the conundrum their clients were in. “Fortunately, they had sent in all their tax documents before they went on the cruise. We finished their tax return, and they were able to access it through the ship’s internet. They signed their tax returns in the middle of the sea!”



Goldbecker continued, “Our clients told us they sat down for dinner and said, ‘It was so good to get our tax returns done.’ The people at their table said, ‘What do you mean you got your tax returns done?’ And our clients replied, ‘Oh, the CPA sent it to us a few hours ago and we just looked them over and signed them. We’re done.’ Everyone else on board had to go on extension because they were stuck overseas and couldn’t get home in time to either sign a return or finish their tax returns.”

Goldbecker said their clients laughed when they relayed the story, “They said, ‘It was so great to get our taxes done and over with and not have to deal with it when we got back. We’re recommending everybody to you!’” That’s certainly the kind of word-of-mouth recommendation any firm would benefit from, and Therrin & Associates is happy SafeSend Returns could help them provide such superior client service in the midst of worldwide chaos. ●●●●

Automatic Reminders Help Both Firm and Clients

Another feature that Therrien & Associates likes about SafeSend Returns is being able to send out automatic reminders for estimated payments. The reminders help clients remember to make voucher payments. Goldbecker remarked, "It helps because some clients like to pay online, or they forget to print it out."

Payment reminders can be set per return during processing or changed after every delivery on one or more returns. Because the reminder feature can be toggled on and off, it is easily personalized so each firm can utilize this feature however is most useful.

Goldbecker has found the reminders cut down on client calls. "I have the reminders set for seven days before the next estimates are due so clients can open it up and make sure they have enough money in the bank. Before we used SafeSend Returns, clients were emailing me, 'I can't find my estimates.' Now, instead of that, I simply resend the link via SafeSend Returns and say, 'I just sent it to you.' It has saved me a lot of time and headaches." Goldbecker added, "I'm not working until 10 o'clock at night anymore!"

Sophisticated Simplicity Works Well with Tax Software

SafeSend Returns is compatible with CCH Access™ Tax and ProSystem fx® Tax, Thomson Reuters UltraTax CS® and GoSystem® Tax RS, and Intuit Lacerte®. Therrien & Associates, a CCH Access user, finds the SafeSend Returns process simple and straightforward. "There's a green CCH circle on my SafeSend Returns screen. I click on that and then drag and drop all the tax returns," explained Goldbecker. "It's perfect. I just click and off I go."



Benefits for Firm and Staff

"It was a big bonus to work from home," Goldbecker said. The value of simplifying the remote work environment was not only realized while at home. Time savings was also experienced in the office as a result of the remote work capabilities SafeSend provided for Therrien & Associates staff. "Before, if I did work from home and had to go in the next day, I'd have to print out 50 tax returns instead of 25 because I wasn't in the office. Then I'd spend all day putting those together and not get anything else done. Now, with SafeSend Returns I have more time to do other things."

With more time in her day, Goldbecker is able to ensure the firm is organized prior to busy season. This helps smooth out the process and streamline the tax preparation procedure. She organizes source documents that clients have submitted and requests missing documents. "I go through the previous year's PDF of tax returns and see if I can figure out what's missing. Then I send the client an e-mail saying, 'Thank you for your documents, but according to the previous season, here's what's still outstanding.' That way by the time we are inputting information, we have it all."

Having the time to do research and organization makes a much more efficient workflow for Goldbecker and Therrien & Associates. "We're a firm that firmly believes in the less touch the better. The more information you can gather before you even start, the less time you spend going back and forth. So, that's how I am able to use my 'spare time' now that I have it because I'm not putting together all those 20-minute tax returns. I'm helping more on the front end of the tax process than the back end." ●●●●

High Marks and Hearty Recommendations

Classifying Lisa Goldbecker as an advocate for SafeSend Returns is putting it mildly. “I never want to go back to doing a paper return again. I’m constantly trying to sell SafeSend Returns, and I can’t say enough good things about it.” She recalled when Scott Therrien, Principal of Therrien & Associates, attended a conference. “He sat down at a table and they were discussing programs and a guy said, ‘So, I’m thinking of SafeSend Returns, what do you think about it?’ And Scott said, ‘You should use it. My assistant keeps sending suggestions and they keep improving upon it. Here’s my information if you want to ask her and talk to her about it, she could sell it to you in a heartbeat!’”

Helping is as Important as Listening

Built on a foundation of listening to customer feedback and suggestions, SafeSend also makes customer service a top priority. “Everyone is very helpful. I can’t say enough about the program. I love it to death,” Goldbecker said.

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“The support desk is wonderful,” she commented. “I like the fact that you can go within each tax return if there’s a problem and write a message. They usually get back to me within a few hours.”

Goldbecker recalled, “when we had our initial setup, Steve Dusablon was on the call and said, ‘Here’s my contact information if there’s any problem where something is not working, please email me and I will personally get back to you.’ So, that’s what I did, and he got back to me. It was great. That’s another thing I like about SafeSend,” she said, “he’s one of the owners and he wants to be involved. He wants things to continually be improved. He’s hands on, ‘What can we do to make things better?’”

Age is Not a Factor

When it comes to computers and automation, a common push-back is the age factor. While technology may come easier to younger generations, just because a person has a few more decades under their belt doesn’t mean they can’t use a computer or understand technology.

Goldbecker shared her thoughts on the age factor when it comes to SafeSend Returns. “I had a client call one day and say he couldn’t figure it out,” she explained. “I said to him, ‘Well, I find that hard to believe because I have an 82-year-old client that only uses email for keeping in touch with relatives. She watched the video and she had absolutely no problem with SafeSend Returns. She said it was the easiest thing to understand.’ He replied, ‘I guess I better get off the phone and go watch the video and learn how to do it.’”

The simplicity of SafeSend Returns and the SafeSend Suite is something Goldbecker believes in wholeheartedly. She knows age is not a factor and certainly not one that keeps a client from being able to have a smooth, straightforward experience using SafeSend Returns. “That’s why I always use my 82-year-old client – who’s now 84 – as an example. If she can do it and she doesn’t use a computer very much, I think someone who is decades younger can do it.”

Goldbecker is confident their clients, no matter what age, can make the switch from paper and take advantage of the automation benefits in SafeSend Returns. “Don’t give me, ‘You can’t do it,’” she said. “That was my push-back when people still wanted paper. I asked them, ‘Did you watch the video?’”

“‘Well no,’ they would answer.”

“‘Please spend the two minutes watching the video and you’ll see how easy it is.’” ●●●●●

No Time Like the Present

It's no wonder Therrien & Associates has shared their enthusiasm for the tax workflow automation solution the SafeSend Suite has provided. "I would wholeheartedly recommend SafeSend to a colleague. Not only is it an easy program, but it's an all-in-one solution where it has the e-signature feature, it breaks out your vouchers, it breaks everything out into sections, so it's easier to understand and is not overwhelming," explained Goldbecker.

"We send an email to our clients when a return is done and say, 'Here's the link to the SafeSend Returns video as your refresher. Please watch to make sure you know how to do it.' So, clients not only get the experience before tax season begins, but they also have the link right there in the email to look at it so they aren't asking, 'How do I use this?' I did not want to be receiving more than 500 phone calls."

Goldbecker recommends firms communicate clearly to their clients and include a link to the short instructional video. Her other piece of advice, "I would not wait until next tax season." Goldbecker recommends to firms who are considering the SafeSend Suite, "Start immediately so you can get the information out to your clientele. You'll avoid having them learn it next tax season while you're trying to get returns done. It will prevent clients calling you while you're trying to do tax returns."

Goldbecker is adamant about acting right away. "The most important thing is to sign up for SafeSend Returns now and not wait. I can't stress that enough." ●●●●

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**Schedule your
demo today
at safesend.com**