



Scott Gasquoine
Partner

KBCA LLC Case Study

About KBCA LLC Accountants & Advisors

KBCA LLC, located in Carson City, Nevada, provides innovative financial solutions to clients in Minden, Gardnerville, Reno, Sparks, and Lake Tahoe. The firm prides itself on long-term relationships and has been serving many of its clients for over 20 years. Their mission is to provide innovative personal and business solutions that empower clients to meet their goals.

Overcoming the Inefficiencies in the Last 10 Yards of Tax Prep

Scott Gasquoine, Partner at KBCA LLC, was tired of the constant trading of documents back and forth during tax season. "I'd go and put the return on the admin's desk and then she'd walk down and give it back to me. I'd review it and sign it, then I'd walk it back to her," Gasquoine said he didn't mind all the walking since it was about the only exercise he got during busy season, but the inefficiencies were glaring. The firm was spending a lot of time in that last 10 yards of tax return completion and delivery. He longed for a better way.

"I thought there had to be a more streamlined solution," said Gasquoine. The desire for a better tax workflow was strong. "That was the impetus to why we looked into SafeSend."



The Appeal of Integrations

Gasquoine attended AICPA Engage and walked by the SafeSend booth as a SafeSend Returns® demo was in progress. Impressed by the snippet he'd seen; he scheduled an in-depth demo for a later date when everyone was back in the office.

"We try to keep as many of our software programs in the same suite so there's less to keep track of," said Gasquoine. As a ProSystem fx® user, the firm was already striving to utilize everything CCH-driven and integrated. Fully compatible with CCH ProSystem fx, SafeSend Returns enabled the firm to automate the grouping, assembly, and preparation of transmittals, e-file authorization forms, payment vouchers, tax returns, K-1s, and the invoice for electronic delivery to their clients.

Up to 30 returns can be uploaded at once, speeding up the tax return process that had been bogged down with manual processes. "**SafeSend Returns is everything.** It delivers the return, it allows for electronic signature of the return, provides immediate downloading of the 8879 once it has been returned, delivers the estimates, and it gives our clients links to pay online," Gasquoine said. ●●●●



Seamless Implementation

The implementation of SafeSend was seamless for the firm. After a training meeting and best practices review, the firm sent out an initial templated email letting clients know they were using a new program prior to delivering the tax return. “We followed everything that SafeSend suggested and our first year, client usage was north of 70%,” said Gasquoine.



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The firm chose to give clients an opt out rather than offering an opt-in. “We said this is what we're doing. If you don't want to do it, you have to sign this form and give it to us,” explained Gasquoine. Most clients adopted the new system, only a few signed the opt-out form. “I had a post-tax-season call with SafeSend after our first year and they were impressed with our client usage.”

Incredible Timing

In 2020, the pandemic brought in-person, paper-based procedures to a halt. Panic was the operative word profession wide. “Everybody needed to scramble to figure out how to deliver things electronically. We had already made that move,” Gasquoine said. “That 70% client adoption rate, became nearly 100% the following year just through necessity.”

Trusting the Software

Relying on the software to make sure that the return is going out as designed and intended to the client has eliminated the process of flipping through every single page of the return after it's been assembled.

At the partner level, Gasquoine said he still reviews the PDF document and reads the transmittal letter. “But then I just let SafeSend do its thing after that,” he said. “I think that was one of the best practices that SafeSend recommended was to trust the software, trust that it's not going to break something.”

The Quest to Eliminate Paper

With an eye on efficiency, Gasquoine embraced the technology that SafeSend provided to eliminate the paper processes of the past that were bogging down procedures in the firm and consuming so much of their time.

“I'm on a quest to eliminate paper in our office. So, I'm interested in any process and procedure where I can eliminate a physical piece of paper. That's the way we're headed,” Gasquoine said.

He noted that the paper usage has been cut significantly since the firm adopted SafeSend Returns, which has been beneficial as the price of paper has increased. The digital solution SafeSend Returns provides is very intuitive and clearly guides the client through each step. Gasquoine pointed out how much less time the admin staff spends fielding calls from clients.

He said that partners still review the return, but spend less time on the back end, and signing K-1 slip sheets. “I spend much less time taking the return across the finish line than I used to,” said Gasquoine. “I do 450 tax returns myself and make less than a dozen exceptions for clients who still want their return delivered to them on paper. The clients have to adapt with us.”

Clients who can't adapt will have to look elsewhere for practitioners who are not adopting tax return process automation. “I don't want to lose a client over that,” he continued, “but at the same time, if it becomes a problem by grinding the procedure to a halt, then those are the painful decisions that you have to make.” ●●●●

Leveraging Technology to Address the Generational Shift

The people nearing retirement at KBCA have done things the same way for decades. Gasquoine realized it would be difficult to find people in their 20s and 30s to come into those roles and want to perform the same manual tasks. Younger generations don't want to do things "old school" when the technology is available to automate those tasks.

Automation solutions aren't replacing staff members, but the workflow is changing. As staff retire, the new generation of digital natives will be the perfect candidates to embrace and leverage technology. Instead of making copies, assembling binders, and mailing out organizers and tax returns, "Maybe we need to hire somebody to use the technology for us," Gasquoine said.



The Numbers Don't Lie

How many CPAs have ever wished for more hours in the day? What's the value of time—especially during the busiest season of the tax year? How can automation impact the work-life balance for a firm? Gasquoine dug into the numbers.

"While it doesn't feel like I've worked less hours since the pandemic happened, **the numbers don't lie**," he said. "I've looked at my timecards from 2017, '18, and '19, and I'm working about five to 10 hours a week less."

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"I would manually review every return and it would take me **15 minutes to do an assembly check and now it takes me five**," said Gasquoine. "Some of those clients where we were manually signing every single slip sheet, we don't do that anymore. We don't sign our 8879s, we're letting ProSystem. We're just putting the fillable name on the 8879, so that all adds up."

Saving ten or fifteen minutes per return may not sound like much in itself, but multiplied by the total number of returns firmwide really adds up for both the partners and the admin staff. Admins reported saving about 20 minutes per return. They rarely have to work overtime to play catch up now. "It's not that I'm necessarily replacing that time by grinding out a few more returns. I think I'm just going home," Gasquoine said. ●●●●

Relying on Trusted Vendors

The partners wear a lot of hats in this local office.

“We don't have a bunch of excess time, so **we rely on our trusted vendors** to tell us what the latest and greatest things are, and we make the decision as to when the right time to integrate those products are,” Gasquoine explained.

Watching the growth of SafeSend and the SafeSend Suite over the years has been exciting for Gasquoine and the staff at KBCA. “**We're excited that SafeSend offers more products and keeps a finger on the pulse of what we need as practitioners.** They let us know what new features and products are available.”

“We dipped our toe in the water with SafeSend Returns. Then the pandemic happened, and we were just in survival mode for 2020 and 2021,” said Gasquoine. He said they looked at the other products SafeSend offers and scheduled a more in-depth demo to see how the other products in the SafeSend Suite fit into their processes.

As a result the firm is expanding their use of the SafeSend Suite this year, incorporating SafeSend Signatures, “**So that we can maybe eliminate DocuSign,**” Gasquoine said. They also plan to integrate SafeSend Organizers and SafeSend Exchange into their workflow as they continue to automate their tax process. “**We're excited to see SafeSend figure out how we can use AI too,**” he said.

Data Security

“I would never, ever want my tax return mailed to me—ever,” Gasquoine said, “I think **SafeSend is more secure from a data security standpoint.** With SafeSend, you have to answer the KBA authentication questions first to access, and then you get the third-party identification and the codes. It's much more secure to me than a paper filing. It's less stuff around your house, too.”

The Simplicity of a Single Login

Often adding technical solutions can end up overwhelming staff with your tech stack. Gasquoine commented on the all-in-one design of the SafeSend Suite. “**It's nice having all of the products in one place with one login.** It's less passwords to remember. We all have a million passwords to keep track of and **having everything in one place is really efficient,**” he said.

He is pleased with how the programs work together and with their tax software. “You can customize whether you want your clients to get an estimate reminder letter on a client-by-client basis and how many days in advance,” said Gasquoine. With the SafeSend dashboard, everything is in one easy-to-access location. “Having everything in one place as opposed to spread across three or four or even more software platforms goes back to being more efficient.”

We're Not Going Backwards

The automated reminders SafeSend provides are valuable for the firm. “Those quarterly touches save us a lot more time,” he said. “It's where everything is headed and we're not going backwards to more paper and more mailing. We're going forward with less paper and less mailing and more efficiency.”

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One of the most beneficial aspects of the SafeSend Suite is the way the assembly, delivery, and e-sign for that last mile of the tax engagement is automated and simplified for both the firm and the client. “The efficiency and time savings of delivering those returns electronically and getting the 8879s back electronically is better than having to chase them down and have the client say, ‘I put it in the mail,’ and then you don't get it,” said Gasquoine. ●●●●

SafeSend is a Partner who Listens

“For me so far, SafeSend has been a little bit more of a partnership as opposed to just a software program,” said Gasquoine. “SafeSend listens to feedback from clients, and I really appreciate the investment that SafeSend is making in the education and training.”

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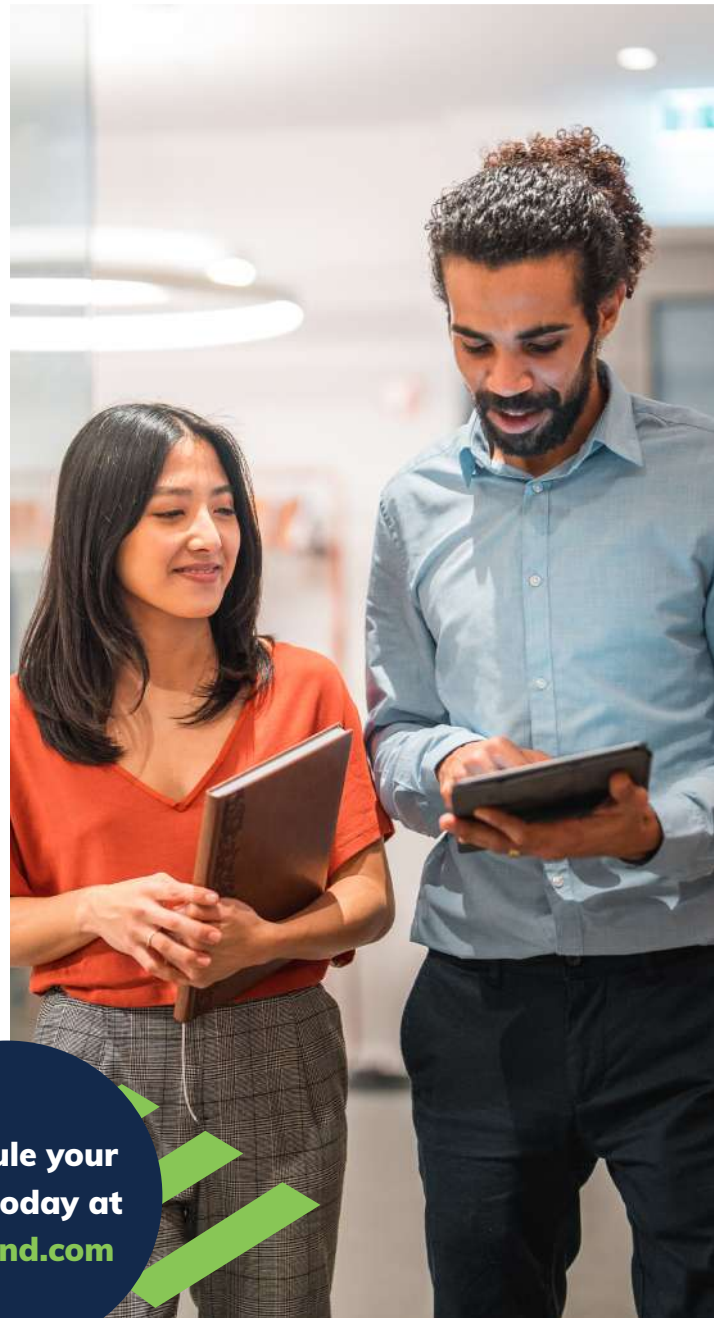
He commented on the teaching and training videos and webinars at prescheduled times that SafeSend, as the expert, provides. “If you have new employees, have them take this webinar instead of you spending your time—or me spending my time—to teach somebody,” Gasquoine said.

Make Life Easier

“We pride ourselves, our firm, on providing that superior level of customer service and we appreciate finding vendors that also feel and think similarly,” Gasquoine said. “That’s one of the reasons why we’re expanding the usage of the SafeSend products. When you work with people who have a similar mindset it just makes life easier.”

Don’t Wait, You’re Always Busy

What is Gasquoine’s advice for firms who are considering implementing SafeSend Suite but want to wait because they think they are too busy? “You’re always busy; you just have to do it at some point. Rip off the Band-Aid® and figure it out because every year it gets easier. **Every year your clients get smarter with using SafeSend.**” ●●●●



**Schedule your
demo today at
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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.

