GSA, LLP
Case Study

SafeSend

Dalton R. Sweaney
Managing Partner

Gray, Salt & Associates, LLP (GSA) & Strategic Business Advisors is a full-service accounting firm licensed in California. They offer a broad range of services for business owners, executives, and independent professionals. The firm's professional staff are members of the American Institute of Certified Public Accountants (AICPA) and the California Society of Certified Public Accountants (CalCPA). GSA is dedicated to professionalism, responsiveness, and quality, and is also part of the AICPA Private Companies Practice Section and the AICPA Tax Section.

Clunky Wasn't Cutting It

"We had been using our tax software's deliverable for e-signing and it was clunky at best. The process for our clients wasn't smooth," said GSA Managing Partner Dalton Sweaney. "We had to click through a number of things to try to figure out where each individual client was in the signing process. There was no filtering we could do. We felt like we were spending a lot of time to get simple data."

One of GSA's promises to clients is to provide services and products that are always of exceptional quality and meet the highest of professional standards. In an effort to elevate the client experience and save time on the firm side, Sweaney said the firm began searching for a solution. "SafeSend has been on our radar," he said, mentioning seeing SafeSend at a conference prior to the pandemic. "We weren't able to make it work and we weren't willing to change our tax software at that time.

"We attended the AICPA Engage Conference post-Covid 19 when it was in person again and SafeSend worked with our tax software." After seeing some of the improvements and a quick demo, "It was a pretty easy sell for us at that point," he said.

Fast, Straightforward Implementation

Implementing new software can be a time-consuming affair. SafeSend One™ is a cloud-based automation solution that doesn't require a lengthy implementation timetable or rollout schedule. There is nothing to install on workstations. There's no large upfront software investment normally associated with traditional tax software implementation or costs involved in obtaining multiple licenses.

"About a year ago, we went through the process of three software implementations, which was quite an undertaking for a small firm," explained Sweaney. "Some were more challenging than others. But the SafeSend instructions were straightforward. It was really pain free. I don't remember any frustrations. All-in-all, a very clean and quick process for us."

"**The SafeSend instructions were straightforward. All-in-all, a very clean and quick process for us.**"

SafeSend ONE

Admin Team Adoration

"**My admin team loves it**," said Sweaney. He said he was anticipating the value on the client-facing side but the excitement from the staff was much more than he was expecting. "After our first tax season, our admin team was gushing about it, 'Oh my gosh, we love this. It's so much better!'"

Having everything in one place as well as the tracking and reporting capabilities SafeSend One provides is a great benefit for the firm. "Being able to see exactly which clients—or spouses—have opened and not yet signed a document, or to filter and find a list very quickly, makes their life a lot easier. They can see exactly what the client has done already. That's super helpful," Sweaney said. "The admin team is loving it.

"We got to the point where nobody worked over 55 hours in our office."

Partner Praise

"From my side, all the questions clients want to know are answered, 'How much do I owe? Where do I pay? Where are the vouchers?' **SafeSend has such a nice package of all of that information in a very easy-to-understand format**."

In the past, his firm prepared the returns, then he met with clients to review. "I was at the point of pretty much every other day—for the full day—meeting with a client. This year, I was able to send the return to the client via SafeSend and say, 'If you have any questions, shoot me a message and I can work through those numbers with you. If it's a more detailed question, we can schedule an interview. Or, if you're good, sign it.'

"I went from 150 appointments the year before to about a dozen tax appointments this year. **I had 10% of my appointments this year! I almost increased my work capacity by 50%**," remarked Sweaney.

Firmwide Workload Reduction

When one person increases their work capacity by 50%, the ripple effect is felt across the team. "I'm able to help out our other partner and do a lot of her technical review. I'm also able to take some of the first review from our managers. **It brought everybody's workload down**."

The efficiency of SafeSend One helped GSA reduce work hours for the entire staff. "**We got to the point where nobody worked over 55 hours in our office**," Sweaney said. "Our partners worked about 55 hours and the rest of our staff was under 50 hours, which is incredible."

Implementing the automation solutions also increased the firm's quality. "**The quality of our products went up** because now we have a higher-level person—me as a partner—being able to do some of that work instead of trying to fill gaps with a manager or senior," he explained. ●●●●

SafeSend ONE

Nearly 100% Client Satisfaction

Providing a smooth and pleasant experience for their clients to review, fill, sign and pay is easy with SafeSend One. "**Our clients—I'd say 95% of them—have been really, really happy with SafeSend**," said Sweaney. Both the firm side and the client side have benefited from the ability of clients being able to go back into SafeSend and get whatever they need, such as vouchers. "The automatic reminders for the vouchers that get sent out, that was nice. We're not having to try to initiate that conversation with them."

Speaking to those outside of the 95% who have loved the switch to SafeSend One, Sweaney said, "There are some who just see—no matter what you do—that it's new and different. They're going to have their feathers ruffled a little bit. We had one client who was adamant, 'I don't want to do this. I'm not doing this.' Finally, she gave it a go and she said, 'This is the best thing ever!'"

While he said there is a small handful of clients who don't like changing what they've done for the past 20 years, he doesn't mind. "By and large, our clients have loved it."

Customized Tax Organizers

Sweaney said they didn't realize SafeSend One was going to be of such significance to the firm. "We didn't adopt SafeSend One thinking, 'This is why we're doing it,' but **the organizers feature has added a lot of value**."

"We had an organizer option through our tax software that just didn't work how we wanted it to. This year, we were able to basically make our own custom organizer with SafeSend One," he said. "You can create custom questions. We were able to get it formatted exactly how we wanted it. Once that's in there you can keep it—year after year—and remove or add a question. It was maybe six hours total to generate, but it's a one-time effort and then it's done."

"Our e-organizers weren't working very well with our tax software. We had to mail out organizers. So, the savings on postage—those are $3 to $4 to mail—times however many clients you have, that's not a small number. Not to mention the printing and the ink. It's nice not to have to pay for that. So, that's been a hard dollar savings. SafeSend One has been great."

Addressing Portal Problems

"Secure file transfer with SafeSend One is how we get the documents in. Then they can be attached to the organizers," said Sweaney.

Historically, GSA used a portal. "If a client submits something to the portal, we get an email, 'This client submitted something.' Then, if we go into their portal account and they've done what seems to be a good thing and created folders to create a tree, it makes us click through all these folders to figure out what on Earth they uploaded, which takes so long," he explained.

"With SafeSend One, it shows a list of everything they've uploaded for this year, the last time it was downloaded, and who downloaded it."

The ability to see at-a-glance what is already in their system and what is a new document in need of attention has been a time saver. "That's been awesome; an unexpected money saver, which is great, but then also time saver because when I had to scavenge through multiple folders looking for this one random document, only to find we already had it—because that's invariably what happens—they send us the same thing 10 times. So, it was a nice, unexpected find," Sweaney said of the SafeSend One dashboard. ●●●●

The Gift of Time

"People ask, 'What do you want?' I want time," said Sweaney. "Can you give me a day? That would be a great gift." Implementing the SafeSend Suite at GSA was the closest thing to gift-wrapping time for everyone in the firm. He calculated how many days he got back using SafeSend, "Every other day, right? Between my appointments—not having to have as many of them—it was great.

"**Nobody in our office had to work evenings**. Once they left for the day they were done. **Everybody's home for dinner**. Nobody worked Sundays. So, tax season becomes a lot more manageable when you're only having to work normal tax season business hours. You don't have those late nights or the Sundays or anything like that."

More Than an E-Sign Solution

"I'm part of a small-firm networking group within the AICPA. Firm owners from across the country talk about software I think most of us have SafeSend now. We're all very much fans of the time savings.

"I'll be honest, at first we wondered, 'Is it really going to be worth it?' We were used to paying a few dollars for DocuSign, so SafeSend was a pretty substantial jump in price. We thought, 'Let's try it one year and see if it is.' Now? Oh my gosh, **this is 10-fold worth the cost**!"

Sweaney said that although the SafeSend Suite seemed like a lot compared to what he was used to paying, "**It does so much more than a signature**. You get the organizer functionality, the document exchange functionality, and the ability to have fewer appointments; there's so much time savings." When calculating the time and money savings across the tax engagement life cycle, the improved customer experience and the workload reduction for the staff, he confirmed the price of the SafeSend Suite is, "Pretty negligible to be able to save that amount of time."

Any Time is the Best Time

"I don't think there is a season for SafeSend," Sweaney said. "Regardless of what time of year it is, there's value. There is no monthly cost, you pay per return that you deliver. So, it doesn't matter when you start, you're going to have those returns, and if you don't use them all, they roll over. **There's no negative side to starting at any time. It's going to save you time**."

GSA implemented SafeSend One in the summer, "It was nice because it gave us a little trial run for those extended due dates—September 15 and October 15. In December and January, we were able to take advantage of the organizers feature. We didn't have to wait for tax season. We had everything dialed and fully working. We were comfortable when time is the most pressed."

The process is fast and straightforward. There's nothing to install or data to transfer or convert when implementing SafeSend One. "**The implementation process wasn't a heavy lift by any means**," he explained. "It was an hour or two per week for three to four weeks. The SafeSend team was able to get it faster than we were, but we were doing some other software implementation as well and I was dragging my feet a little."
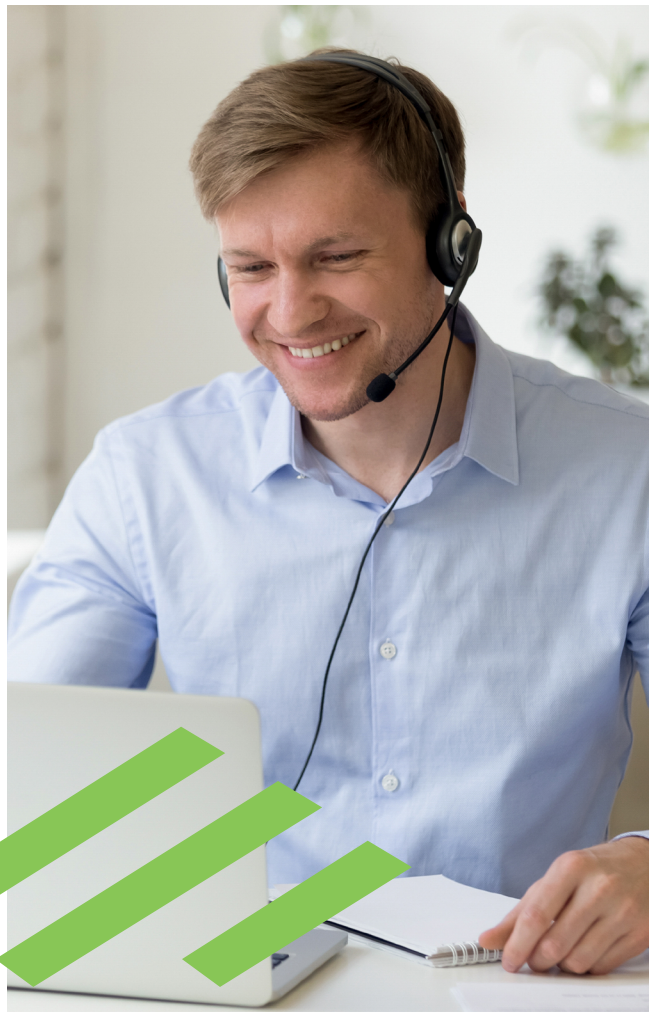
SafeSend ONE

Fantastic Customer Service

Tackling a new software implementation can be an undertaking no matter what size the firm. For a small or medium firm without a designated person, software implementation can be especially challenging. "For me, what makes or breaks it is always the customer service side of that software."

Sweaney had praise for their SafeSend Customer Success Manager, "He was fantastic throughout our entire process. I would send an email and he'd get back to me right away with the exact information that I needed."

"For me, what makes or breaks it is always the customer service side of that software."

Efficient Visibility and Tracking

Prior to SafeSend, the lack of visibility and tracking of the signing process within the firm's tax software often left the team guessing. "It was easy to miss somebody that had signed or not signed. There wasn't a great way to figure out where somebody was in the queue," said Sweaney. "If they had multiple states, that became kind of tricky."

Rather than experiencing efficiency and instant visibility, they were constantly confirming their work. "When you have to check a lot of times to make sure you're not missing something, that's not ideal."

The firm found a solution in SafeSend One that improved their processes. Sweaney said, "Our goal was reducing our hours so that our quality increased. We didn't want to throw band aids on things to get jobs over the line, but to have capacity to think critically and have a higher quality product that we're delivering to our clients. We were able to do that **with SafeSend One's organizers, secure file transfer, and returns features. The three of those were fantastic**." ● ● ● ●

SafeSend ONE

SafeSend

SafeSend ONE

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 SafeSend One™.
Our tax returns product 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 SafeSend One™

SafeSend One is the end-to-end solution that automates the entire tax process, from gathering to delivery, offering firms an all-in-one solution to provide an unrivaled client experience. A secure and easy-to- use product for engagement letters, file transfers, organizers, e-signatures, and tax return assembly and delivery, now with a new and innovative AI- driven gathering capability.

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

For more information, visit safesend.com.

SafeSend