

Top 10 Accounting Firm

Introduction

This case study of a Top 10 Accounting Firm is based on an August 2017 survey of SurePrep customers by TechValidate, a 3rd-party research service. The profiled company asked to have their name blinded to protect their confidentiality.

“I had a great experience with all aspects of SurePrep.”

Challenges

This Top 10 Accounting Firm has more than 67,000 employees in over 1,400 offices across the globe. The company wanted a way to increase the profitability of their tax practice.

Use Case

The company looked to engage with a vendor partner that offered technology and services to increase their 1040 preparation efficiency coupled with fast turnaround times. Additionally, the company uses GoSystem Tax RS to prepare their 1040s so integration with GoSystem Tax was a requirement. The company chose SurePrep.

Results

The company implemented 1040SCAN and achieved the following results:

- Increased 1040 realization rates of 15-19%
- Reduced the time spent bookmarking and organizing tax workpapers
- Reduced the time spent entering source document data into tax software
- Improved their tax return preparation efficiency
- Reduced tax season workload compression
- Reduced their reliance on paper

The company gave SurePrep a 5/5 star rating and rated SurePrep's support as "Excellent".

Company Profile

The company featured in this case study asked to have its name publicly blinded because publicly endorsing vendors is against their policies.

TechValidate stands behind the authenticity of this data.

Company Size:
Top 10

Industry:
Accounting

About SurePrep

SurePrep was founded in 2002 and is the leader in 1040 automation for CPA firms. SurePrep's solutions are used by more than 19,000 tax professionals ranging from Big 4 firms to sole practitioners. SurePrep provides the most automated solutions available to streamline the entire 1040 process for both the CPA and taxpayer.

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