

Big 4 Accounting Firm

Introduction

This case study of a Big 4 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.

“SurePrep’s 1040 tax productivity solutions are best-in-class.”

Challenges

This Big 4 firm is one of the world’s most globally-coordinated tax practices, with a network of 28,000 professionals in more than 120 countries. The company wanted a way to automate their tax practice and provide a consistent tax preparation process.

Use Case

Choosing a vendor that delivered a consistent process that allowed for practice wide deployment and easier resource management was crucial. Additionally, the company uses GoSystem Tax RS to prepare their 1040s so integration with GoSystem Tax was a requirement. The company chose SurePrep based on the following:

- OCR recognition for more source document types
- SPbinder workpapers
- Optional OCR data verification service (1040SCANverify)

Results

The company implemented a combination of 1040SCAN and TaxCaddy and achieved the following results:

- Increased 1040 realization rates
- Reduced the time spent entering source document data into tax software
- Reduced tax season workload compression
- Reduced their reliance on paper

The company gave SurePrep a 10/10 Net Promoter Score and rated SurePrep’s support as “Very good”.

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:
Big 4

Industry:
Accounting Firm

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.

Learn More:

[SurePrep, LLC](#)