

THE DESIGNATED MOTIVATOR
FOR ACCOUNTING PROFESSIONALS

Practice Playbook:

WHY SMARTVAULT IS YOUR TAX SEASON MVP

THE DESIGNATED MOTIVATOR FOR ACCOUNTING PROFESSIONALS



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Dawn W. Brolin, CPA, CFE is the founder of Team Brolin an organization dedicated to helping accounting professionals and small businesses optimize their operations and reduce their fraud risks.

She is also the owner of Connecticut-based CPA firm, Powerful Accounting Inc., and author of *The Designated Motivator* and *The Designated Motivator for Accountants*. She provides practical advice based on her experiences for individuals who have the passion for engaging, encouraging and empowering others to reach their full potential in accounting firms and their personal lives.

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HOME RUN TECH STACK

STARTING LINEUP

1	Practice Management / Workflow	First Base	 KARBON
2	Marketing /CRM	Pitcher	 keep
3	Client Management	Catcher	 Liscio
4	Document Storage	Second Base	 SmartVault
5	Payroll Processing	Short Stop	 ADP
6	Accounting Software	Third Base	 qb <small>intuit</small> quickbooks
7	Time Tracking	Right Field	  qb <small>intuit</small> quickbooks
8	Quoting	Left Center	 Quotient
9	Tax Software	Left Field	 Lacerte®  ProSeries®  protax
10	Inventory Management	Right Center	 FISHBOWL
11	Foreign Banking Transactions	Pinch Hitter	 truly financial



“Maximizing the true profit potential of your practice during tax season is only possible if you have A-players on your team. SmartVault has been part of my Starting Lineup for more than 10 tax seasons!”



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REASONS TO

MAKE SMARTVAULT THE MVP OF YOUR FIRM'S STARTING LINEUP THIS TAX SEASON

Chances are, if your firm has a significant portfolio of tax clients, document management is of significant concern to you. I know from my own experience in my firm that unless you have document management truly dialed in before tax season, you are going to strike out during the heat of it.

REASON 1

DMS BUILT FOR ACCOUNTANTS AND TAX PROFESSIONALS

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ou simply cannot have the most efficient and profitable tax workflow in place without a DMS. I want to clarify here that I mean a DMS that is actually built for accountants and tax professionals. This is a key point, not all DMS options are equal. In fact, most of what's out there is not made to withstand or support all that the typical tax preparation process requires, such as customizable tax-specific workflows, bank-level security, e-signature capabilities, and integration with other practice management and tax solutions. This is why the selection of a DMS that is built for your firm is critically important.

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REASON 2

SECURE FILE SHARING

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ere is another absolutely critical fact: if you handle documents of any type, tax-related or not, you need a truly secure system in place, from both a user access point of view and the protection of your clients' data from cyber criminals. Not to mention, all of your data needs to be backed up in the cloud. Your DMS must also allow you to fetch your incoming client documents easily and efficiently because as we all know, during tax season time is money.

REASON 3

DOCUMENT MANAGEMENT AND FILE SHARING COMPLIANCE

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here are many different ways to handle data and documents, but in the eyes of cyber security experts and the IRS there are only a few DMS platforms that measure up in this regard (Spoileralert! This is a key reason I use SmartVault!).

From what I have been hearing and seeing with my peer practitioners, Covid has brought the need for an all-star DMS to the forefront of many practitioners' minds.

REASON 4

CLOUD BASED SYSTEM

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f your firm has a team of employees and you use third-party contractors, you may have had to scramble to put in place the tech infrastructure necessary to support them for working remotely during the pandemic. Or at least you did if you weren't already working with all of your documents in the cloud, with control over user access rights. This is a key reason why I was able to not only survive but thrive in the pandemic period. I already had a seamless, cloud-based system in place that was completely IRS compliant and secure.

I built this system with SmartVault and the time I spent implementing it has paid off in dividends with new clients and a profit-rich workflow to support my growth during tax season.

REASON 5

BRANDED CLIENT PORTALS

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Another key consideration, and perhaps one of the most important ones, is the awesome client experience (CX) you can offer with the right DMS, which should allow you to have secure client portals and provide your clients with the most convenient, intuitive, and secure platform for them to interact with your firm.

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ounding out this list (Of course, you should make your own list, too!). Business continuity is another key factor that comes into play with a DMS. After all, we've all seen how the pandemic forced major shifts in the way that we have had to work outside of our regular work environments (if your practice involves a physical building), not to mention the risks associated with potential storms, fires, and other natural or accidental business disruptions that are part of life. Without a strong backbone for organizing, storing, and securing your firm's documents, there's no way you can keep operating "no matter what!"

"If your current DMS doesn't allow you the flexibility and security to tackle these issues, it's time to upgrade before you get hit with another tax season that is more stressful and less profitable than it should be."

WHY SMARTVAULT IS A HEAVY-HITTER IN MY FIRM'S STARTING LINEUP

If you're not familiar with my philosophy about choosing the right technology for your firm, here's the quick rundown: I believe that every firm has at least 10, and usually more, key positions that it needs to fill with A-players in order to truly maximize its productivity and profitability. I call this core tech stack (the solutions that allow you to do the work you need to do with the highest level of productivity and profitability) the Team Brolin Starting Lineup.

LINEUP

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In my Starting Lineup, SmartVault is my go-to solution for managing document access and organization with my clients and third-parties who need access to files. All of my client files are securely hosted via SmartVault in the cloud and I can print directly to SmartVault as well as send documents to be e-signed through DocuSign from the platform. Clients can securely upload and transmit files using SmartVault, too. But that's just the beginning of what SmartVault has to offer us as accounting professionals! One of the most powerful points about SmartVault is its ability to play so nicely and so powerfully with the rest of the key players in my Starting Lineup, during tax season and beyond.

LISCIO

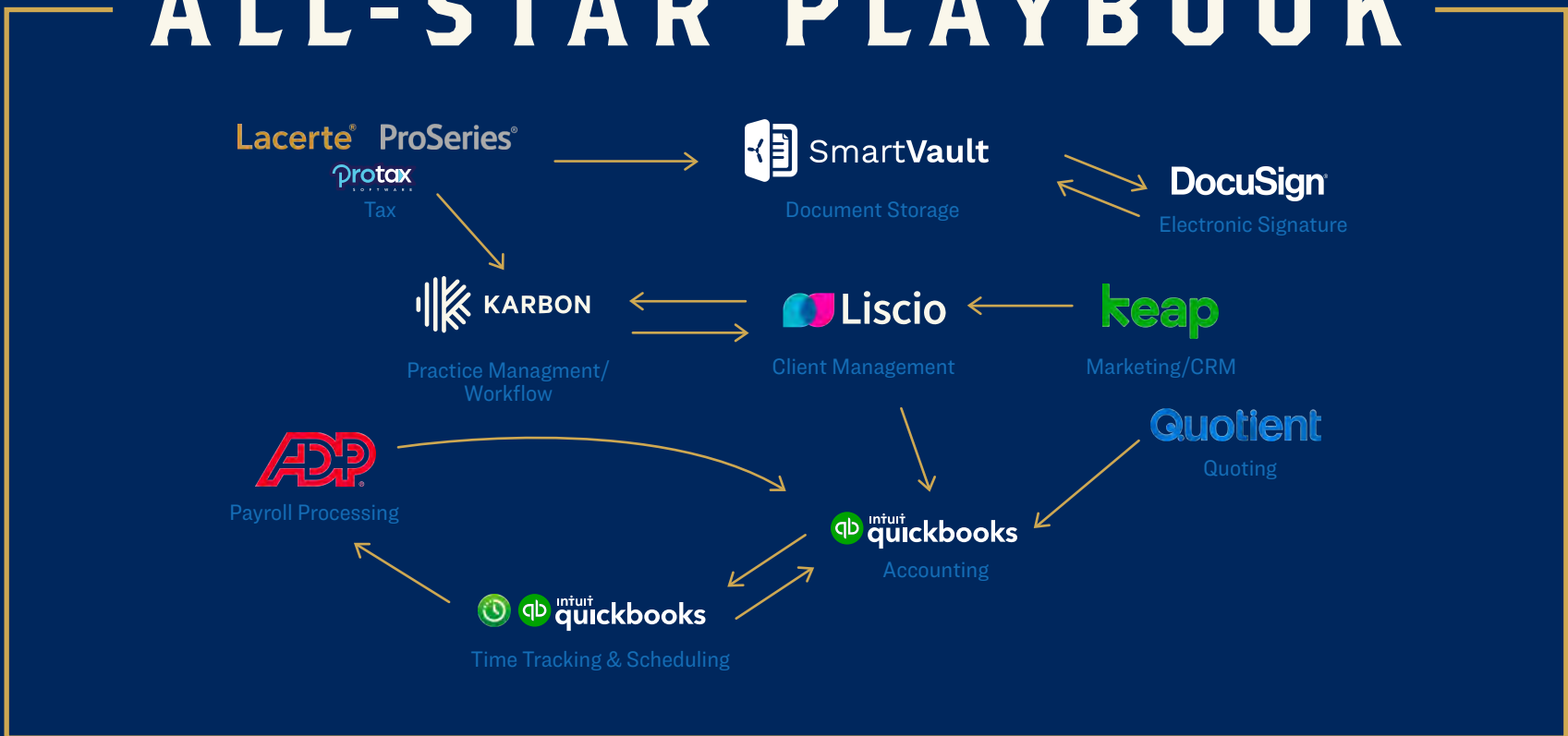
KARBON

LACERTE

SMARTVAULT

STARTING LINEUP

ALL-STAR PLAYBOOK



The integrations that SmartVault has with so many of the other A-players in my Starting Lineup including Karbon, Lacerte, and Liscio are truly awesome and set it apart from other potential DMS options. There really is not a comparison in my experience! We'll take a deep dive into these integrations in the following articles.

LINEUP

6

TIME-SAVING
TUNE UPS
FOR YOUR
FIRM'S
PRE-TAX
SEASON
PLAYBOOK

START USING A
DOCUMENT
MANAGEMENT
SYSTEM

USE THE
REQUEST
DOCUMENTS
FEATURE

IMPLEMENT OR
IMPROVE YOUR
CLOUD-BASED
WORKFLOW

SYNC
SMARTVAULT
WITH YOUR
TAX SOFTWARE

CREATE A
COLLABORATIVE
CLIENT
EXPERIENCE

IMPLEMENT
DOCUSIGN
INTEGRATION

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s a very happy and productive SmartVault user for more than a decade, I know that tax season after tax season, SmartVault is always ready to play hard during the busiest season of my practice. SmartVault remains one of the core solutions in my tax season Starting Lineup, not only because of all of the efficiency, security and advanced integrations it provides, but because as a company, SmartVault continually invests in making their document management system (DMS) better and better for accounting firms

Every year and with every enhancement, SmartVault allows my firm to come back stronger and better both for my team and for my clients. This is because they are always adding more features and functionality that benefit not only my firm, but my clients as well. The SmartVault Team is without a doubt focused on providing amazing value to accounting and tax professionals. Using SmartVault, I have increased my client portfolio even during Covid, and I expect to do the same this tax season. It's definitely a solution that can help your firm scale.

"As a very happy and productive SmartVault user for more than a decade, I know that tax season after tax season, SmartVault is always ready to play hard during the busiest season of my practice."

BEFORE TAX SEASON STARTS, TUNE UP YOUR TAX WORKFLOW WITH SMARTVAULT'S POWERFUL INTEGRATIONS



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he time to put SmartVault in place is now—before tax season. If you are looking for ways to take your game to the next level this tax season, (who isn't?) then now is the time to implement SmartVault. When you ask for a demo be sure to mention the specific Tax Season Tune Ups from below that you have questions about, so the team at SmartVault can answer any questions you have about them.



DOWNLOAD

Tuning up your tax season workflow really depends on having the right tech stack integrations. This is what I call my Team Brolin Tax Season Playbook. You can download it [here](#) and then use these **blank templates** to create your own.



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he following list of Tax Season Tune Ups will help you implement your own Tax Season Playbook for your firm. If this seems overwhelming to you, then the easiest way to approach it, from my own experience, is to simply put one play into practice at a time.

SmartVault is making it super easy for you to get started with the following Pre-Tax Season Tune-Ups. These are the key time-saving (which translates into profit-making) tune-ups I use in my own practice.'

I'll be showing you how to implement them at the Up Your Game this Tax Season with **Key SmartVault Game Plays webinar**. We'll make a plan so you can get it done working your way through the list, tune up by tune up.



BEGIN NOW AND YOU'LL BE READY TO HAVE YOUR MOST PRODUCTIVE AND HAPPY TAX SEASON EVER:

PROVEN PLAY 1

START USING A DOCUMENT MANAGEMENT SYSTEM

Start using a document management system that's built for accounting firms. Your first tax season game play from the Playbook should be implementing SmartVault. Every firm needs a document management system, but not every DMS is created equal! SmartVault was actually developed for accounting firms, which means it is built to help you make your tax season more secure, streamlined, productive, and profitable.

That's not just lip service, friends. SmartVault on its own can be completely customized for a typical(or atypical!) accounting firm workflow. But when you integrate it with your other core technology solutions the results are truly incredible.

TUNE UP PLAY 1

START USING A DOCUMENT MANAGEMENT SYSTEM

Consider this example:

You can embed SmartVault client folder links in Karbon, which is my go-to practice management solution, allowing you to “live” in Karbon but have access to clients’ tax docs with the click of one button. These time savings add up! I calculated that doing this saves me 5 minutes per return, if I do 310 returns that is 25.84 hours @ \$375 my hourly rate, = \$9,960 in billable time.

“Every firm needs a document management system, but not every DMS is created equal! SmartVault was actually developed for accounting firms, which means it is built to help you make your tax season more secure, streamlined, productive, and profitable.”

TUNE UP PLAY 2

IMPLEMENT OR IMPROVE YOUR CLOUD-BASED TAX WORKFLOW

"One of the most powerful points about SmartVault is its ability to play so nicely and so powerfully with the rest of the key players in my Starting Lineup, during tax season and beyond."

Implement or improve your cloud-based tax workflow. It goes without saying—at least I hope it does—for most tax professionals that keeping all of your documents safe and secure should be an integral part of your pre-tax season plan.

This means getting everything—and I mean everything—into the cloud. SmartVault allows you to do this seamlessly and securely while also enabling your clients to collaborate with you there. This is an essential part of any pre-tax season tune-up because if you don't have a solid foundation for a cloud-based workflow this tax season, you are not going to succeed in creating a streamlined, secure, and stress-free tax season experience for yourself, your team, or your clients.

TUNE UP PLAY 3

3 CREATE A COLLABORATIVE CLIENT EXPERIENCE

Create a collaborative client experience (CX) in the cloud with SmartVault and Liscio. This is a tune-up I am taking advantage of right now! I am implementing Liscio in my firm—I love it and so do my clients! Liscio is a client experience app that gives accounting professionals a better way to communicate and meet my clients where they are without having it disrupt my personal time.

With Liscio, I CHOOSE when I answer a client communication, most importantly, anyone on my team can see all of the communication so that it isn't 100% on me to answer every single request from a client.

One of the most amazing things I've discovered about Liscio is that it plays perfectly with SmartVault and integrating these two solutions is simple. I can quickly and securely share sensitive files with clients and/or staff directly from SmartVault without having to leave Liscio. My clients can receive documents in Liscio and review them securely on the go.

TUNE UP PLAY 4

USE THE REQUEST DOCUMENTS FEATURE IN SMARTVAULT

Use the Request Documents feature in SmartVault to automatically obtain and track all of your client's documents—before you even start a return! The SmartVault Request Docs feature is an efficient way to request specific documents from your clients with built-in templates connected to engagements, the ability to send reminders, and easily upload files.

Plus, you can also request a standard group of documents from multiple clients and set up notifications when you receive them from each individual client.

TUNE UP PLAY 5

5 SYNC SMARTVAULT WITH LACERTE, PROSERIES, OR OTHER TAX SOFTWARE

Transform your tax workflow by syncing SmartVault with Lacerte, ProSeries, or other tax software. When it comes to taxes, there's a lot of front loading related to tasks that have to be performed before even getting to the step of return preparation. SmartVault can help you create the efficiencies necessary to eliminate manual work and billable time from being wasted in this process.

If you're a Lacerte or Intuit ProSeries user, then you can save literally hours of time, just by having your default document print settings go automatically to SmartVault.

TUNE UP PLAY 6

IMPLEMENT DOCUSIGN INTEGRATION

Implement DocuSign integration for both client engagement letters. As I mentioned above, all of my client files are securely in the cloud using SmartVault. In addition to being able to print files directly to SmartVault, you can also send them to be e-signed directly from it, too. Having the DocuSign integration in SmartVault is an amazing time saver for proposals, engagement letters, and tax returns. Plus our clients love the convenience and security of it!

In addition, implementing SmartVault, taking action on these tune-ups and the other game plays I will be covering during the webinar will show you how using SmartVault and powerful technology integrations will increase your profits and productivity this tax season—and all yearlong! In fact, you may just find time to do some things that will make you happy this tax season, and support your productivity, too!

PLAYBOOK

"When it comes to taxes, there's a lot of front loading related to tasks that have to be performed before even getting to the step of return preparation. SmartVault can help you create the efficiencies necessary to eliminate manual work and billable time from being wasted in this process."





HOW TO HAVE A PROFITABLE TAX SEASON, AND A LIFE WITH SMARTVAULT

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re you dreading the arrival of tax season again? Let's be real...we are in year three of a tax-cycle which really has never ended. Given the pandemic, PPP, and all of the tax changes along the way, it's been a grind. This is why it's so important to set yourself up for success--and your clients, too--otherwise your stress is only going to be compounded when those returns start rolling in.



HOW TO HAVE A PROFITABLE TAX SEASON, AND A LIFE WITH SMARTVAULT

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rom what I have been hearing in our profession, there are a significant number of accounting and tax professionals who are feeling burnt out.

This is why having the right tech stack in place is so important. We've covered some of the ways you can use SmartVault integrated with your tax software and other apps to really shave time off every return and make your tax workflow super efficient (We'll do a deep dive during the webinar, as well). Making sure you accomplish these fundamental technology implementations is key, especially before tax season so you and your clients can be prepared for a new way of doing things.



HOW TO HAVE A PROFITABLE TAX SEASON, AND A LIFE WITH SMARTVAULT

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f the thought of making changes is central to your feeling of being overwhelmed, then ask for help. Starting with the on boarding process. The team at SmartVault is awesome at this. They really do make it easy! They can even help you integrate with other apps, they know accounting practices. Helping us is what they are built for and continue to build for--to create happier and more productive accounting practices one professional at a time.

Of course, having the right tech in place is just one piece of the puzzle to a happier and more productive tax season--you need to get your mind in the right place to motivate yourself and your team to get into return preparation mode. I am going to take a couple of pages right out of the Team Brolin Practice Playbook and share with you some of the ways that I keep myself ready to face the challenges that only tax season can bring.



Remember your why for doing what you do. We have to identify and remind ourselves of the things that brought us into the accounting profession in the first place.

**MAKE A LIST OF SOME THINGS YOU LOVE ABOUT YOUR
CAREER AND YOUR PRACTICE:**

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5	



Now, not everyone has these positive thoughts all the time, that is normal. However, please DO NOT let someone else steal you away from the profession you love.

Consider how to change your mindset by shifting how you operate. Take a minute to brainstorm on some of the reasons you may not be enjoying your work right now. Then make a solution set to address them.

MAKE A LIST OF SOME THINGS YOU DON'T ENJOY ABOUT YOUR CAREER AND YOUR PRACTICE:



HOW TO HAVE A PROFITABLE TAX SEASON, AND A LIFE WITH SMARTVAULT

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ind time to do the things that you love--even during tax season. In 2019 I made the pivotal decision to coach the college softball team at my alma mater--Eastern Connecticut State University. Although I really didn't "have the time" to do it, the training was right during tax season, I did it anyway because I felt like I was doing something for myself and I wanted to encourage this next generation of female players, much like others had done for me.

The team ended up going to the national championship! It was absolutely amazing and an experience that was life-changing for me, too, because it made me write my first book, *The Designated Motivator* followed by *The Designated Motivator for Accounting Professionals*. Also to note: my practice didn't fall apart! Even during tax season. This is because I have a tech stack and workflow that supports my life. Not the other way around!



HOW TO HAVE A PROFITABLE TAX SEASON, AND A LIFE WITH SMARTVAULT

So there you have it! Some of the fundamentals for keeping your next tax season and your life on track. Despite the demands of your life and your work. Get the tools you need to succeed, starting with SmartVault.

SEE YOUR
TAX SEASON
MVP IN
ACTION

MAKE IT HAPPEN

SCHEDULE DEMO