

How SmartVault Improved Efficiency

For Powerful Accounting

It's been more than a decade since Dawn Brolin first reached out to SmartVault to discuss how she could securely move her client files to the cloud from the on-site servers she had been using at her firm, Powerful Accounting, LLC. Since her initial transition to the cloud, Brolin has never looked back. She's looked at every possible feature of SmartVault to maximize all available integrations, workflow efficiencies, and security benefits for herself, her team, and her clients.

"When I first started using SmartVault, I realized that it needed to be the hub of my practice workflow, and it truly fills that role for my practice. The first thing we do when we get a new client is onboard them with access to their folders in SmartVault," Brolin shared. "We have put a repeatable system in place with a specific folder setup we use, which makes it easy to scale our services. In fact, during the pandemic, we added close to 100 new tax clients without increasing our staff time because we have that system in place."

Brolin's practice runs securely, 24/7, "no matter what" with SmartVault's cloud-based functionality and compliant security features.

In addition to scaling her practice with SmartVault, Dawn is also a big proponent of having all of her client files securely in the cloud within her designated, access-protected folders for security and business continuity. "If you, your team, and your clients cannot access files easily, in real-time, with all of the cybersecurity and compliance taken care of, you are really putting the continuity of your practice in peril. You need to think not only about the day-to-day workflows you are using, but about the longevity of your practice, too."

This means ensuring that all of her documents and files are accessible from anywhere for Brolin. So that in the event there is a physical disruption to her office, her team can work remotely without missing a beat.

SmartVault's tax and practice management integrations power up Brolin's practice profitability.

For Brolin, putting the right tech stack in place has given her the edge she needs to maximize her practice workflow, increase her firm's cybersecurity, and keep all of her documents securely in the smartvault.com

cloud. It has also inspired her to help other accounting professionals do the same.

With SmartVault's native integrations with tax software such as [Lacerte and ProSeries Tax](#) and practice management tools like Karbon, Brolin's firm workflows are smooth, seamless, and save serious time, increasing her bottom line revenue significantly.

SmartVault is the heavy-hitter in Team Brolin's Starting Lineup Tech Stack

As Brolin shares in her book, [The Designated Motivator for Accounting Professionals](#), she believes that one of the fundamental keys to her success is using the right connected technology solutions. "If you think you are limited to a certain number of clients based on the number of hours you have in a day this is simply not the case," she said. "By implementing a workflow and tech stack that delivers maximum ROI, you can keep adding clients by expanding and connecting your tech stack, too."

SmartVault is featured in the book and on the [DawnBrolin.com website as one of Brolin's key Starting Lineup Team Members](#), because, as Brolin has remarked, "I am a SmartVault girl, for sure, it's fundamental to my practice and it truly does fill a firm's document management system needs like no other solution out there. Storage, systematization, security, and synergy with other key technology solutions, SmartVault is the heavy-hitter in my firm's tech stack bar none."



Built with bank-level security, SmartVault offers a cloud-based document management system and client portal designed to help you reduce costs, raise productivity and employee happiness, stay in compliance, and deliver higher levels of service.

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