



The Thorough Software Switch Checklist for Firms Moving to Intuit ProConnect Tax™



Most firms know their current software isn't perfect, but the idea of switching always gets kicked down the road. After all, there are plenty of risks: downtime, lost data, confused staff, and a learning curve nobody asked for.

That said, the longer the delay, the more time and revenue gets lost to inefficiencies, patchwork fixes, and frustrated clients. And while switching software isn't simple, with the right plan, it becomes much less painful and powerful.

If your firm is preparing to move from Lacerte or ProSeries — or another on-premise tax prep app outside of the Intuit ecosystem — to ProConnect, the shift to cloud-based workflows opens a major opportunity. This is the perfect time to optimize your entire tech stack with **critical integrations like SmartVault** that dramatically elevate what ProConnect can do for your firm.

Use this checklist to prep, plan, and survive the transition.

STEP 1

Audit current tools and workflows

Many firms say technology is a strategic priority, but only [25%](#) track metrics to measure how well it's working. This means most firms blindly invest in tools without knowing if they're improving workflows or just adding noise.

So, before you even think about switching software, you need a clear picture of your current setup.

To-do list:

☐ Map out every tool currently in use:

Make a full list of all the platforms and tools in your tech stack: tax prep software, document management systems (DMS), eSignature tools, client portals, and task trackers. Note any gaps where you're handling files manually or using disconnected systems.

☐ Identify recurring pain points:

Where are things breaking down? Look for inefficiencies like double data entry, broken integrations, or processes that require multiple manual steps. Document specific pain points around document management and secure client file sharing that SmartVault could address.

☐ Talk to your team:

No one knows the software pain points better than the people using it every day. Ask them what's working, what's slowing them down, and what they wish they had.

Firm Spotlight



How One CPA Doubled His Client Base While Working Less Hours

The dream of a truly self-sustaining accounting practice – one that makes more money while you work less – often seems out of reach. But for Nick Boscia, CPA, EA, Partner at Boscia & Boscia PC and Founder of The Balanced Firm, this dream became reality after implementing SmartVault alongside his Intuit tax software.

From Overwhelmed to Streamlined

Before SmartVault, Nick's New Jersey-based practice faced challenges that might sound familiar:

Inconsistent document collection:

“Clients were either dropping off physical paper that we'd have to scan – super inefficient – or sending documents through unsecure email.”

Capacity limitations:

“We were getting new clients and increasing revenue, which was great! But I was working a million hours and spearheading every process.”

Security concerns:

Client financial documents sent via email created significant security and compliance risks.

Work-life imbalance:

“If I have to be in my firm every day working for it to operate, I'd never be able to go on vacation and do the things I love outside of work.”

→ Nick implemented SmartVault in 2019

The Results Speak for Themselves

Doubled Client Base

“SmartVault’s secure client portal enables us to send electronic document request lists to clients. They upload documents directly into the portal where they’re automatically organized. This allows us to handle a much larger volume of clients efficiently.”

Improved Security with Granular Permission

“We have internal folders that we don’t necessarily want the clients to see – things like email correspondence or quotes.” The firm can maintain a clean, user-friendly interface for clients – who can go into the portal and quickly find what they need – while keeping internal documents secure.

Seamless Integration with Tax Software

“We use Intuit Lacerte. The direct integration with SmartVault automatically builds out all our folders for every single client. It also pulls in their emails and invites them to make a SmartVault account.”

Note: SmartVault’s integration with ProConnect works exactly the same way as with Lacerte, giving you these same powerful benefits.

Enhanced Client Experience

“Our clients like having secure access to their documents and tax returns in SmartVault because it’s accessible 24/7 from wherever they’re located.”

True Work-Life Balance

“My fiancé and I just went to Bali for two weeks and our firm ran completely fine without me there.”

The Takeaway

Nick’s story demonstrates that by implementing the right technology, you can [achieve what seems impossible](#): doubling your client base while improving work-life balance and increasing profitability. His advice? **“Be curious to try to solve any of your firm’s pain points. If you’re not living your dream life, there are tools out there to make your firm better and give you the life you want.”**

Is your firm ready for similar transformation? As you move to ProConnect, adding SmartVault can help you achieve the same results as Nick’s firm.

STEP 2

Define goals for the new setup

Moving to ProConnect opens the door to significant improvements, but the real power comes from pairing it with purpose-built integrations. Cloud tax software alone isn't enough—you need an [integrated document management and client portal solution](#) that completes your workflow. But without clear goals, it's easy to lose sight of what matters to your team.

To-do list:

☐ Define what “better” looks like for your firm:

Are you trying to reduce manual data entry? Improve turnaround time? Enhance the client experience? Get specific and visualize how documents should flow from client to preparer to reviewer to final delivery.

☐ Evaluate SmartVault as your ProConnect document management companion:

While ProConnect handles tax preparation, SmartVault addresses the critical document workflow needs with:

- Seamless integration that eliminates toggling between separate applications
- Secure document collection directly from clients
- Automatic organization of documents by client, year, and return type
- Bank-level encryption for all sensitive financial documents
- Branded client portals that improve your firm's professional image

☐ Prioritize the features that support those goals:

Use your vision as a filter to identify the most important functionality, whether it's integration depth, automation, scalability, security, and compliance, or remote and mobile access.

STEP 3

Inventory client and file data

Garbage in means garbage out. If your client data is disorganized before switching software, the problems won't disappear; they'll just get harder to fix. With SmartVault's migration tools, this is the perfect opportunity to clean up your document organization.

To-do list:

☐ **Create a full list of active and archived clients:**

Don't just export your client list and call it a day. Sort clients into categories (e.g., active, inactive, seasonal, or long-term) so you can prioritize what needs to move immediately and what can be archived or skipped.

☐ **Audit your file types and formats:**

Make a note of what types of documents you're storing across the firm: PDFs, scanned images, spreadsheets, Word docs, etc.

☐ **Flag sensitive files and custom access needs:**

Which folders or documents contain sensitive client data, payroll, bank info, or PII? Which files should only be visible to partners or managers? Create a list of any access rules or permissions that need to be rebuilt in the new system. SmartVault's granular permission settings make this easy to implement. In fact, permissions are automatically set as you add new clients, so you don't have to worry about remembering to set them (or spend time manually doing it per client).

STEP 4

Create a migration plan

A clear migration plan helps avoid deadline panic, team burnout, and expensive do-overs. Even firms with solid tech skills benefit from some structure here, especially when client files, internal roles, and software permissions are all in motion at once.

To-do list:

☐ **Choose a timeline that avoids major deadlines:**

Switching software right before or during tax season is a recipe for chaos. Aim for the off-season instead.

☐ **Assign clear roles for core responsibilities:**

Don't let everything fall on one person's shoulders. Designate who's in charge of file migration, client communications, and staff training.

☐ **Evaluate DIY vs. white-glove options:**

Some firms prefer to manage the migration in-house, using self-serve tools. Others opt for a more hands-on experience with help from their vendors — SmartVault, for example, has helped over 5,000 Intuit firms (and thousands across other platforms) migrate their data into SmartVault.

STEP 5

Prep your team

Even the best software will fall flat if the team isn't prepared. But most small firms don't invest in training — only [32%](#) offer formal tech onboarding, compared to 77% of larger ones.

When expectations aren't clear and the “why” gets lost, confusion and resistance fill the gap. That's why internal rollout needs just as much attention as the tech itself.

To-do list:

☐ **Schedule training sessions for new tools:**

Don't rely on trial and error. Set aside dedicated time for hands-on walkthroughs of your new systems. (With SmartVault, firms can choose between self-serve webinar options, staff-specific training modules, certification options, and personalized training sessions led by our onboarding and customer success teams.)

☐ **Set up internal documentation and FAQs:**

Collect common questions and edge cases as they arise. Create a living internal doc or shared FAQ that covers login steps, how-tos, and support contacts.

☐ **Collect real-time feedback as the team adjusts:**

Don't wait for frustration to boil over. Regular check-ins, Slack threads, or short surveys can surface small issues early.

STEP 6

Notify clients and update portals

Clients don't like surprises that involve how they access, upload, or share sensitive financial documents. Whether they're tech-savvy or still faxing forms, any disruption to their experience can trigger confusion or frustration if not communicated clearly.

To-do list:

☐ **Draft a clear, client-facing announcement:**

Let clients know what's changing, why it's happening, and how it benefits them. Highlight how SmartVault's client portal makes document sharing easier and more secure for them.

☐ **Set expectations around new logins and processes:**

If clients will need to reset passwords, access a new portal, or change how they upload documents, make sure those steps are spelled out clearly. Provide deadlines and support contact info as well.

☐ **Use branded portals to reinforce trust:**

A well-designed, branded client portal makes the transition feel polished and professional.

☐ **Offer how-to guides or quick videos:**

A short screen-recorded walkthrough or step-by-step PDF can prevent dozens of support emails. If you're using [SmartVault's Enterprise Onboarding](#), you can even request a custom guest user video tailored to your firm's portal setup.

STEP 7

Run a pilot

A controlled pilot is one of the most important steps when switching software. It gives your team a low-risk environment to test everything before rolling it out firm-wide.

To-do list:

☐ **Start with a smaller group:**

Pick a test group that reflects your typical workload but won't create major risk if hiccups happen. This could be a single office, a small batch of returning clients, or even an internal team using the system for mock returns.

☐ **Track key performance indicators:**

Use the pilot to evaluate file migration success, process speed, and client engagement. Pay special attention to time savings from the SmartVault integration compared to your previous document workflow — most firms save 10 minutes per return!

☐ **Adjust folder structures, naming conventions, or workflows as needed:**

This is your chance to make real-time refinements before they scale. SmartVault's flexible folder templates make it easy to standardize document organization across all clients. Folders are then automatically created per client or engagement type, so you don't have to manually create the folder structure every time you add a new client or engagement.

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“Clients always know where to find their documents, and our staff can easily locate files when covering for each other. If I need to go to a conference for a week, my tax partner can go into SmartVault and have everything he needs to prepare a client's tax return. I don't have to email him a link – he just knows where to go because it's so consistent with our folder structure. This consistency significantly boosts our productivity, especially during tax season when we aim to be productive rather than just busy.”

Dawn Brolin

CPA, CFE, CEO, Powerful Accounting,
The Designated Motivator

STEP 8

Go live

The official launch might feel like the finish line, but in reality, it's just the beginning. A successful go-live depends on how well your firm supports the team, captures feedback, and adapts in real-time.

To-do list:

☐ **Assign a dedicated point person for launch-day support:**

Make sure someone is on-call to handle real-time questions or issues. It doesn't have to be IT; it just needs to be someone with answers (or the ability to escalate quickly).

☐ **Document common questions and issues:**

Every issue is a chance to improve. Keep a running log of what goes wrong, what confuses people, and how it was resolved.

☐ **Lean on your vendor's support team:**

SmartVault's industry-leading support includes dedicated onboarding managers, live office hours, and the unique SmartHour service for quick refreshers even after onboarding is complete—support features that set them apart in the document management space.



Why SmartVault x ProConnect is worth the switch

Switching software isn't easy, but it is worth it when the end result solves the problems your old system created. If your firm is ready to leave behind clunky workarounds, disjointed tools, and slow, manual processes, [SmartVault x ProConnect](#) is the modern upgrade that checks every box.

While ProConnect gives you cloud-based tax preparation, SmartVault completes your workflow with:

- Secure document collection that eliminates email attachments and unsecured file transfers
- Automated folder organization and document routing that saves hours of manual filing
- Professional client portals that elevate your firm's image
- Granular permission settings that protect sensitive data
- Full audit trails for regulatory compliance
- Seamless integration that keeps your team in their workflow, not switching between apps

And if you're worried about the switch itself, you're not doing it alone. SmartVault offers everything from self-serve tools to hands-on onboarding, custom folder mapping, and team training. Whether you prefer to go at your own pace or want full support from the start, there's an option to suit your needs.



Learn more about
SmartVault x ProConnect today.

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