SmartVault

Same Firm. Same Clients. Different Outcome.

What happens when engagement goes right — and when it doesn't

Engagement goes wrong		Engagement goes right
A number gets invented on the intake call, and a vague letter gets signed. Nothing defines what's in scope or what isn't.	**Engage**	Discovery comes first. The client picks from three data-backed tiers, and scope, signature, and payment are locked in before work begins.
Clients receive a generic checklist, ask follow-up questions, send documents in multiple places, and still miss key items.	**Collect**	Clients know exactly what's needed. Requests are tailored based on last year's return, so collection starts organized and with less follow-up.
Prep starts with a search for the document that's sitting in somebody's inbox or saved elsewhere.	**Prep & Review**	Documents and information flow into organized, review-ready workpapers, so the team spends their time reviewing returns instead of assembling files.
The finished return sits in limbo, waiting on a signature and a payment.	**Deliver**	The client knows where to go to review and eSign. Payment was settled back at Engage, so nothing sits waiting.
A question comes in months later — and answering it means digging through old email threads.	**Archive**	The signed letter, source documents, and return all live in one client record, secured in a SOC 2 Type 2 compliant platform.
Revenue doesn't match the hours. The team is running on empty.		**The work you billed is the work you did. The gap never opens.**

SmartProposal — built into SmartVault — helps firms define scope, price confidently, collect signatures and payment, and create the foundation for everything that follows.

Learn more at www.SmartVault.com/SmartProposal