

# How Tandy Consulting, Inc., Saves \$60K With SmartVault

## Tax and Accounting Consulting

Tandy Consulting, Inc., a [tax and accounting firm](#) serving a wide range of industries, struggled with inconsistent processes that bogged down operations. As the President, Travis Tandy grew increasingly tired of the inefficient workflows – from inconsistent file organization to wasting time recreating client folder structures and constantly chasing down client source documents.

Determined to find a solution to streamline processes, create consistency across his firm, and enhance the client experience, Travis discovered [SmartVault](#), a cloud-based document management system and client portal built specifically for accountants.

### Automation and Consistency Save Time and Money

Implementing SmartVault quickly proved beneficial. “We truly streamlined our processes,” Travis recounted. The standardized folder structure eliminated the need to create and recreate folders for each client, so what was once a time-consuming task is now a completely automated process. “This saves the firm days of time,” Travis said.

With everything organized the same way across all clients, Travis and his team can work and access documents much more efficiently. “Everything is the same, always,” he said, emphasizing the importance of ensuring his team follows consistent processes across his firm.

The [eSignature functionality](#) also provides a major boost, automating the signing process and saving time. “Requesting signatures on any document is a simple right click and send,” Travis explained. “We also now spend zero time on the phone asking for documents since clients can upload everything directly to the portal.”

### Going Paperless with Positive Client Feedback

Tandy Consulting mandates client portal usage, which has allowed the firm to achieve 100% paperless operations. “Our clients love it,” Travis shared. “We’ve had nothing but positive feedback.” This shift has been a hit with both the firm’s staff and its clients.

The efficiency gains delivered by SmartVault have been quantifiable. Travis estimates that the firm has eliminated \$30,000 to \$60,000 in labor costs by streamlining processes and reducing headcount.



Travis Tandy, President  
[Tandy Consulting](#)

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