SmartVault

Intuit Users:
Create a Consistent and Efficient Client Experience with This 5-Step Checklist

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Powerful Accounting
The Designated Motivator

One of the most effective ways to simultaneously create efficiency in your practice and elevate your service level is to create consistency in your client experience. This is how I have been able to grow my firm's revenue and increase client retention and satisfaction – all without adding more overhead in terms of staff or layers of unnecessary technology or administrative burden.

Since the client experience parallels your actual workflow for every engagement, examining your processes in both areas is fundamental to optimizing your productivity.

To help you break the process down, you can use the checklist in this document. It's what I created to implement a consistent client experience in my practice.

Evaluate the Five Key Areas of Client Experience in Your Practice

There are five critical areas of the client experience that we focus on to create consistency that provides clarity, confidence, and efficiency for everyone involved, from the client to our team and, of course, for me as well. These include:

1   Workflows
2   Communication
3   The right document management system
4   Efficient document and data intake
5   Leveraging technology to finalize engagements and work with e-Signatures

Locking down my client experience and leveraging SmartVault from onboarding through every step of my workflow process is a critical component of my success. It's also been integral to my ability to scale my firm without adding layers of staff or unnecessary technologies to keep my team and clients happy.

I have broken down my best practices here into a checklist you can take to create your own consistent, efficient, and profitable client experience that will help you enjoy working with your clients again and again!

CHECKLIST ITEM 1: WORKFLOWS

Before we can share with clients how to work with us, we need to determine the key workflows you need to create for your end-to-end client experience. For example, in my tax workflow outlined below, each step that involves my client is automated or, at the very least, has a standardized process that optimizes our time and technology:

1. The client contacts the office.
2. Our admin sets the client up in SmartVault.
3. The admin books 15 minutes on my calendar to quote the engagement.
4. The client accepts the quote.
5. Our admin sends a custom client organizer.
6. The organizer is returned, and our admin adds clients to Liscio® and Lacerte®.
7. We import the client from Lacerte into SmartVault.
8. Then it's time to collect the documents, which we do using the Request Doc feature in SmartVault.

Your workflows might look a little (or a lot) different, but the most important thing to do is to actually document them so you can then see where any bottlenecks or barriers to efficiency are. Then you can work to eliminate them with either a change in process or tools used.

CHECKLIST ITEM 2: COMMUNICATIONS

After you have the workflows mapped out, communicate them to your client and your team. This is just one example of how we work with our clients to help them maximize the benefit of collaborating in the cloud with our firm.

They immediately see how technologically savvy we are and how seamless the process is when they work with us, which is critical to client retention and satisfaction. I know many firms are using Liscio as part of their client communications. The great news is that Liscio and SmartVault play together seamlessly with a native integration. My clients and I love it!

Liscio handles the front-end client communication, helping to answer client communication; most importantly, anyone on my team can see the communication so that it isn't 100% on me to answer every request from a client.

Then, I can quickly and securely share sensitive files with clients and/or staff directly from SmartVault without leaving Liscio. My clients can receive documents in Liscio and review them securely on the go. Talk about consistency and convenience!

CHECKLIST ITEM 3: A DOCUMENT MANAGEMENT SYSTEM

An essential part of the client experience is, of course, gathering documents from clients and being able to create a templated folder structure for efficient document intake and management. Doing this through the entire client experience workflow is an immensely valuable time saver. Plus, using SmartVault enables me to comply with the security requirements for safeguarding client data.

In our current compliance environment, using a document management system built for accounting firms as part of your client experience workflow brings multiple benefits. From being able to customize your client workflows to the essential security features, plus all the integrations available, SmartVault stands in a class by itself regarding best-of-breed document management platforms.

Build a Scalable, Efficient Tax Prep Workflow with Intuit and SmartVault

SmartVault is the only document management and client portal platform that integrates with Lacerte®, ProSeries®, ProConnect™, and QuickBooks®.*

Integrating SmartVault with your Intuit tax prep app provides multiple benefits:

▸ **Automate Setup:** Eliminate manual entry with automatic client, folder, and permission creation.

▸ **Smart Routing:** Documents automatically filed in correct folders, saving time and reducing errors.

▸ **Efficient Tracking:** Monitor tax returns, organizers, and client interactions via intuitive dashboard.

▸ **Unlimited Growth:** Scale your practice with unlimited document storage and client users.

▸ **Centralized Management:** Access all documents securely from any device.

▸ **Enhanced Security:** SOC 2 Type 2 compliant with encryption, MFA, and granular controls.

▸ **Client-Friendly:** Modern, branded portal for secure sharing, e-signatures, and payments.

Learn more & schedule a demo

CHECKLIST ITEM 4: SEALING THE DEALS

Client signatures! Nothing happens without them...We all know that to get an engagement started or completed, we must get engagement letters and various forms signed. Doing this securely and in the cloud is the only way to have a truly client-friendly experience.

From proposals to engagement letters and tax returns, **SmartVault eSignature** boosts our productivity and time savings for our firm and clients. Using SmartVault means no more chasing down client signatures or handling painful paper documents, making the whole client experience much more convenient.

With all my client files securely in the cloud using SmartVault, plus printing files directly to SmartVault and sending them to be e-signed directly from the system, that's magic!

> Using SmartVault eSignature is a fantastic time saver for proposals, engagement letters, and tax returns. Plus, our clients love the convenience and security of it!

CHECKLIST ITEM 5: CUSTOMIZED COLLABORATION

Yes, we all know that every client is special and unique, and although consistency is key for efficiency, we also don't want an inflexible system to be a hindrance. SmartVault can be customized for a typical (or atypical!) accounting firm workflow. From the user access level **to the folder structure** and most things in between, it's easy to build the exact client experience you want and need depending on your services!

Plus, you can request a standard group of documents from multiple clients and set up notifications when you receive them from each individual client. That makes working across clients consistent for your firm and provides a standardized way for your clients to get their documents directly to you.

In today's business environment, having an exceptional, collaborative client experience truly can be a game-changer for your firm. It allows you to create actual value for your existing clients, efficiency for your team, and a true differentiator for prospective clients.

This is why having the right tech stack in place is so important. This starts in my firm with SmartVault integrated with my tax software (Lacerte) and other apps like Liscio, which makes my client experience stellar and my workflow super efficient.

SmartVault is a central part of my tax workflow, and just about every other client service workflow in my firm. I have been using SmartVault for almost 12 years, and it is the backbone of our tech stack, making delivering an amazing client experience super simple.

Take Action! Create Your Consistent and Efficient Client Experience

Now is the time to reassess your success and ensure you accomplish these fundamental technology implementations, especially before the next busy season, so you and your clients can be prepared for a new way of doing things.

Clients are the lifeblood of every practice, and they can also be internal pain points if we don't create the right experience for them. Start with intention and this checklist to create consistency, efficiency, and convenience.

Ensuring you have the most efficient and consistent client experience possible will make your firm more productive and profitable now and in the future.

Maintain a Thriving Firm with SmartVault and Intuit

For Intuit users, SmartVault offers unique advantages that boost efficiency, enhance security, and improve client collaboration. Explore the key benefits of this powerful partnership:

Secure Client Engagement

Enable clients to safely upload documents and eSign forms, while keeping your team and clients informed with automated notifications in a centralized, cloud-based repository.

Efficient Workflow Management

Track tax returns, organizers, and client interactions through an intuitive dashboard, with customizable workflows for annual, one-time, or ad-hoc engagements.

Anytime, Anywhere Access

Improve responsiveness and productivity with 24/7 mobile accessibility to all your documents.

Unlimited Scalability

Grow your practice without limits, leveraging SmartVault's unlimited storage and client capacity.

Uncompromising Security and Compliance

Ensure data privacy and meet industry compliance needs. We're Soc 2 Type 2 Compliant.

Schedule a Demo

SmartVault

Over 3 million people have shared, exchanged, or collaborated on more than 400 million documents (and counting) in SmartVault. See how SmartVault can power your business.

VISIT SMARTVAULT.COM   SCHEDULE A DEMO

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