

How The DC Firm Enhanced Client Services, Cut Costs, and Moved to a Digital Office with SmartVault

DC Firm | Tax and Accounting

“It was horrible,” recalls Sandy Christiansen, The DC Firm’s Administrator, of the chaotic tax season when their previous client portal failed. As a practice managing 500 clients and processing over 525 tax returns annually, the client portal plays a significant role in their tax season.

But it wasn’t just that the portal going down at the peak of the busy season. Sandy continues, “The portal had no automated workflow – everything was manual. And to compound matters, our IT contractor discovered a serious security flaw in the system.”

The DC Firm needed a solution – and fast.

A New Era of Efficiency

That’s what led them to discover [SmartVault](#), a document management and client portal platform built for accountants. Sandy, who spends a significant portion of her day working in SmartVault, quickly experienced the benefits of using modern, reliable tech. “I love the Connected Desktop and how I can easily work with files,” she enthuses.

One of the most significant changes was the shift towards digital processes. “SmartVault has allowed us to have a much larger percentage of our clients doing their entire process via the portal, so we are sending far fewer hard copy returns,” Sandy notes.

“**With SmartVault, we can keep our workdays to a normal schedule rather than working long crazy hours.**”

Boosting Profitability and Work-Life Balance

The impact of SmartVault on The DC Firm’s bottom line was immediate and substantial. “We have downsized staff significantly, which allows us to be more profitable, thanks to SmartVault,” Sandy reveals.

But the benefits weren’t just financial. The increased efficiency had a profound effect on the team’s quality of life.

“With SmartVault, we can keep our workdays to a normal schedule rather than working long crazy hours!” Sandy exclaims, highlighting the improved work-life balance that came with replacing their prior client portal with SmartVault.

Enhancing Client Relationships

Perhaps the most remarkable aspect of The DC Firm's transformation was how it enhanced their client relationships, even as they moved to a more digital model. Sandy explains, "SmartVault has freed us up to have more meaningful phone calls and faster response times to client questions. Everything is much more efficient, and clients appreciate how quickly we can respond to them."

The automatic notifications prove particularly valuable: "The notification emails are key to my workflow because I handle all the uploads and downloads, and they provide an audit trail."

The firm also appreciates the insight into client interactions. "I can see when clients were in their vault. No guessing...I know whether or not they have accessed their returns," Sandy notes, appreciating the added level of certainty this brings to their operations.

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A Successful Remote Transition

The true test of SmartVault's capabilities came when The DC Firm decided to relocate their office. "SmartVault allowed us to relocate our business 3 hours away from our main client base while improving our service quality," Sandy reveals. This move, which could have been disruptive, instead became an opportunity to showcase the power of their new digital workflow.

Sandy describes the new process: "Now, clients upload their docs, have a Zoom if needed to prepare their return, and then download their completed return, review, complete their eFile Authorizations, and then we eFile for them. Easy peasy – and no time wasted!"

Looking to the Future

With the success they've experienced, The DC Firm is excited about further leveraging SmartVault's capabilities. Sandy is particularly keen on implementing new features in the upcoming tax season to streamline their processes even more.

When asked if she would recommend SmartVault to others, Sandy's response is enthusiastic and unequivocal: "Absolutely! I would recommend SmartVault to others. It allows me to make sure not one single document is missed."

For The DC Firm, SmartVault has been more than just a DMS and client portal. By enabling efficient remote work, enhancing security, and improving client interactions, SmartVault has helped the firm increase profitability, maintain work-life balance, and provide superior service to their clients.

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