

Commonwealth Tax Scales During Busy Season with SmartVault's Integrated Tax Workflows

Commonwealth Business Services | Virginia, USA
Full service tax, accounting, and business consulting firm

By replacing manual, outdated processes with automated workflows and robust tech, Commonwealth Business Services benefits from significant growth and efficiencies that scale.

Commonwealth Business Services, a full service tax, accounting, and business consulting firm in Virginia, has 14 staff that serve more than 600 tax clients. The firm was using a document management system (DMS) that required them to manually upload documents. It was inefficient, John Coleman, CPA and the firm's owner, realized.

He started looking for a new DMS that would streamline their workflows and reduce manual tasks. And, he wanted it implemented before the quickly-approaching tax season.

Seeing how robust tech can empower his firm.

When John saw how another practitioner uses SmartVault's integrated DMS and client portal for a secure, streamlined, and integrated tax workflow, he decided he needed SmartVault too. SmartVault could solve his current challenges and help him maximize efficiency and serve more clients.

Increasing tax return volume by 10% was simple with SmartVault.

Commonwealth Tax saw significant growth since implementing SmartVault. They went from preparing about 400 tax returns in 2019 to over 670 in 2022—more than they have ever done. This is credited to the efficiencies the firm gained with SmartVault.

These efficiencies include things like being able to quickly drag, drop, and organize files directly from email or other digital sources. "Being able to drag and drop... whatever you want into SmartVault is amazing," he says.



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John Coleman, CPA, Owner





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“Another aspect that I really love is the integration with Lacerte, which is our tax program. We are able to directly print the PDFs to SmartVault, and then print the PDF so the tax return pages are in one PDF. We can also print the e-file forms to another PDF,” John says.

“It’s so quick and much more efficient than what we used to do, and our admin loves it because she doesn’t have to go through and manually pull those pages and send them however she needed to send them to the client.”

Implementing before tax season was seamless.

“The implementation of SmartVault was actually pretty simple,” says John. “Even right before tax season, there were no issues. In fact, I haven’t had a single complaint from my team.” Commonwealth Business Services also took advantage of SmartVault’s training, so they were up and running quickly. This gave John more time to devote to things outside of work, like spending more time with his family.



“I was afraid I was going to miss my children’s [baseball] games due to my work. That never happened during this tax season. I was front and center not only for each game, but also every practice.”

John Coleman, CPA,
Owner

John’s children play baseball, and he’s passionate about being at their games. “I was afraid I was going to miss my children’s games due to my work,” he says. “That never happened during this tax season. I was front and center not only for each game, but also every practice.”

SmartVault lets his team work smarter and faster.

“[SmartVault] is a great program. We are extremely happy with it,” John says.

“All of my administrative staff use SmartVault, and they love it. It really has allowed us to keep adding tax clients without having negative impacts on our ability to serve them efficiently.” But, it’s not just about the work.

John has better work-life balance, even during the busy season. Being able to spend more time together is something he and his family greatly appreciate.

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