BMSS Advisors & CPAs

SafeSend

BMSS LLC Advisors & CPAs
Case Study

Melody Young
Admin Operations Manager

BMSS LLC Advisors & CPAs is the second-largest locally owned advisory and CPA firm in Alabama. The firm serves clients in the $1 million to $50 million revenue range—the majority of which are family-owned-and-operated businesses. BMSS is a member of the BDO Alliance USA. In addition to tax and audit, they offer robust practice areas in state and local tax, estate planning, employee benefit plan audits, and business advisory and consulting services.

Going with the Flow: From E-Sign to Assembly and Delivery

Long before SafeSend One™, there was the e-sign technology of SignatureFlow®—later known as SafeSend Signatures, and now part of SafeSend One. BMSS had used the e-sign solution from SafeSend for several years. However, as time passed, the firm began searching for a solution to the traditional, time-consuming delivery process for 1040s.

"They were taking a lot of time. We were looking for an easier way," recollected Melody Young, Administrative Team Coordinator at BMSS. "We used the signature software before [SafeSend One]... We were looking for something to help deliver our 1040s. We were one of the early adopters."

Helping alleviate pain points by listening to customers' needs has always been at the center of the relationship SafeSend has built with firms nationwide. In BMSS's first year using SafeSend One, they encountered a challenge where the default e-file form associated with the Alabama privileged tax return was not being recognized.

"SafeSend listens to customers and rolls things out for us," Young affirmed. "I talked to SafeSend co-founder and Chief Innovation Officer, Steve Dusablon, right after tax season that first year and told him we would really like to have [SafeSend One] recognize that e-file form. Before we went into mini tax season—extension season in the fall—it was set, and we were rolling with it!

"Everyone likes the [SafeSend One] software. Our admin team sends our tax returns, and our clients really love it. I would say **we have 99.9% approval from our clients.** It's easy to use, it's easy to help clients if they have a question, SafeSend fixes everything."

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One System Streamlines Three Locations

Implementing a new system across multiple locations can seem daunting, but with SafeSend, the experience was smooth. “We have three offices, and incorporating each of the offices has gone really well,” Young says. “When we first implemented [SafeSend One] for our 1040s, it was just the Birmingham office. SafeSend does all the training to help you implement everything. They answer your questions, they're there to coach you along the whole time. They make it very easy. I was taught how to use SafeSend, then I showed the admin team.”

Soon, not only was the admin team delivering tax returns in record time, but the accountants also noticed that their clients were able to sign so much more easily and quickly. According to Young, “We had one turned around in 5 minutes and the accountant said, ‘I'm sending all mine through SafeSend from now on!’”

When BMSS began sending business returns via SafeSend One, they saved even more time. **“We implemented business returns and we have increased our usage by 78%. It is going fantastic,”** Young says. “It is much better to have everything centralized rather than having 10 software packages to bounce between and remember what’s what. If it's all housed in [SafeSend One], then you're working out of one place. We're super excited about that.”

The Impact of a Natural Workflow

In addition to delivering 1040s and business returns, BMSS takes advantage of the full capabilities of SafeSend One and delivers engagement letters for e-signature.

“We had some 1040 engagement letters that didn't get signed in January for whatever reason. I used the mail merge tool, sent those letters all back out, and I'm getting them all returned now,” Young says.

Creating a workflow in which documents are delivered in the natural order that clients review them reduces frustration points for both the tax department and the client. SafeSend One doesn’t just automate the tax return assembly and delivery for firms; it simplifies the entire process for taxpayers, ensuring firms receive everything they need completed in a timely manner.

There’s one other feature Young particularly appreciates. “If we don't have the engagement letter signed, we can deliver it with the actual tax return. When they sign the e-file forms, they have to sign the engagement letter as well before the SafeSend system will send everything back to us. It's not a separate thing they have to do; it's all in one place."

“I like that I'm able to deliver extensions to the clients through [SafeSend One].”

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Excitement Multiplies with APIs

Turning wishes into reality and eliminating manual tasks for firms through automation solutions are at the heart of everything SafeSend does. API (Application Programming Interface) enhancements further enhance the automation solutions by providing integration for firms to streamline their procedures.

An example of how the firm benefits from SafeSend's APIs is the automatic update of the status of 8879 e-file authorization forms in BMSS's tracking software.

"We turned on the API to download the e-signed documents," Young says. "So, any e-file forms that were e-signed were downloaded automatically. We knew if it had been e-signed in SafeSend we could trust it so we could e-file. It took so many steps away and made that process faster for us. Our IT guy, Tyler, is helping with the SafeSend APIs—streamlining and automating a whole lot more—and using SafeSend to do it."

BMSS Data Analytics Manager, Tyler Crawford, elaborates on the impact of API enhancements on their process. "Prior to the March deadline, we turned on the API available from SafeSend to give us real-time notifications when our 8879 forms were e-signed. We were able to use the notification as a trigger to initiate an automated process that e-filed our tax returns. This API from SafeSend seamlessly processed our 8879 signature form notifications smoothly through both deadlines."

"The API was doing what it was supposed to do," Young adds. "More than anything, it's taking the stress off of everybody."

Saving Time and Money

Returns are at the core of SafeSend One and remain one of the most significant time-savers for firms.

"A basic tax return can take 30 minutes," Young says. "I probably do tax returns faster than anybody does. I timed myself one time and I can get it done in six to eight minutes. It takes about 15 minutes to thoughtfully go through the return making sure we have everything for the client. I'm methodical about it because we want to get things right for the client. But SafeSend pulls it all apart correctly. I know it's saving 15 minutes on every return. It's saving us a lot of time and a lot of money."

Another time-saving feature Young mentions is e-file archiving. "Now there is archiving of e-file forms. Since that API was turned on, I don't have to go out there and archive any e-file forms—they're automatically archiving for me!"

The Full "Tax Ready" Experience with SafeSend One Premium

Pleased with their years of digital automation with SafeSend One, BMSS desired more for their firm and their clients. Providing one streamlined and natural workflow across the entire tax engagement was their next goal and SafeSend One Premium was the solution.

"There were several reasons we moved to the full SafeSend One," Young says. "We're already using Returns for delivering our tax returns. That has been smooth, and our clients really love it. The new rollout of [SafeSend One] makes it so much easier. Everything is right there."

Consolidation into one location was another factor in the enhanced customer experience they considered. "One of the main reasons for the upgrade is that we want anything our clients receive from our firm either coming from our email address or from SafeSend so that they know that it's something that can be trusted," she says. "It's easier, rather than receiving it five different ways."

Another factor in the upgrade to SafeSend One Premium tier pricing is Exchange. "We want [SafeSend One] to replace ShareFile for us," Young says.

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Providing A Smooth Client Experience

Automating the tax engagement with SafeSend One is one way BMSS ensures an exceptional client experience, according to Young. “We’ve been using SafeSend for quite a while. Our clients really like it. They can sign from their cell phone. They can sign from an iPad, or their computer. They can be on vacation looking at their tax return, sign everything, and get the e-file forms back to us. If it's being paid online, they can click on a link and pay. Or they can wait till they get home, download their vouchers, just write a check, and mail it in. They actually love it.”

Additionally, the instructions provided in SafeSend One are simple and straightforward to follow. “It tells them the next step so it's super easy.”

Another feature aimed at enhancing the client experience is a checklist designed to simplify the process and aid in keeping track of the information required by the firm to prepare their tax returns.

“We're excited about the DRL (Document Request List,” Young says. “We’re going to create a document request list for our business returns to aid our clients in sending documents back to us. We’ll also use it for 1040 clients as another way we can get what we need from them.”

“I’m hoping we can even start to use it for our audits. If we can use it for that, we can do away with a whole other software we’re paying to use.”

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SafeSend Support Shines

Reliability is paramount, especially during tax season when deadlines are looming and any hiccups are simply not an option. "We really don't have glitches," Young says. "If something happened, it's a very rare occasion. **SafeSend support is probably the best support IT team I have ever seen with anything I've ever worked with**. They get on it fast. I get a call within 20 minutes. They have some kind of resolution for me. They always give me some kind of turn-around time."

Summing up the firm's experience with the Support team at SafeSend, Young says, "We're never down, we get to keep going. It works fantastic."

Digital K-1 Distribution with Business Returns

"The first year that we delivered business returns through SafeSend One, we knew we'd never go back," Young says. "**One beautiful thing is that it lays out all the K-1s for the client. SafeSend saves that e-mail address** and auto populates the email address from the previous year for easy delivery of the K-1s to their shareholders or partners through the software. **So, the next year when they go to send their K-1s, that e-mail address is going to be there, and they can update it if necessary. That's very beneficial. Clients like that a lot**."

The ease of digital K-1 distribution is another way SafeSend One helps BMSS provide an excellent experience for their business clients. Clients still have the option to download K-1s and distribute them manually or by mail if they prefer not to use electronic distribution.

Changing the Pace of Deadline Weeks

Long hours and late nights are often associated with tax deadlines. However, the time-saving benefits of SafeSend One have had a remarkably positive impact on staff well-being.

"**I could expect to work 80-hour weeks on deadline weeks, and I don't come anywhere near that now**," Young says. "Now the admin team works probably 50 hours max, and I come closer to 50 than the rest of them do. So, they're working 45-hour weeks because of SafeSend."

She also notes that in addition to reducing the admin team's workload, BMSS was able to reduce hours for all the accountants. "Instead of them being required to work 60-hour weeks from February through April 15, they were only required to work 55 hours because we took a lot of that administration stuff off of their plate. Having the APIs helped cut out a lot of that work."

A healthy work-life balance, streamlined processes, and an improved client experience are three of the top reasons BMSS is so pleased with SafeSend One's capabilities.

"We can't sing their praises enough. SafeSend is a no-brainer. I mean, it literally is a no-brainer."

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Peace of Mind for Firms and Their Clients

Providing consistent service with the most accurate information is of paramount importance to firms and their clients and serves as a driving force behind all that SafeSend offer.

Young outlines her firm's aspirations for their clients and explains how SafeSend helps them achieve this goal. "One of the things our company strives for is peace of mind. Giving our people peace of mind, we call it the Disney experience. You know, it's just, 'Wow!' Thinking about all those little things. SafeSend gives you the Disney experience. They give you peace of mind. They're constantly looking for ways to make things better. They don't roll something out until it's ready to be rolled out. I really appreciate that.

"SafeSend keeps up with the e-mail addresses and with the tax law; they really pay close attention. In fact, they have information more up to date than the tax software has. I've told my admin team, 'If the address looks a little different with SafeSend, go with it, they've got it right.'"

Helping firms serve their clients is important. Maintaining security and compliance are of the utmost importance. Marrying the two is a key component in the trust SafeSend builds with its customers.

"We really appreciate that they care more about the tax law and the accountants—and us being compliant—rather than just trying to sell us something," Young says. She holds her hands up and proclaims with a big smile, **"I heart SafeSend!"**

Automation That's a Win-Win with No Learning Curve

Implementing new software in a firm can be an enormous undertaking. However, Young understands the ease of adopting SafeSend One and the significant benefits her firm has reaped. She shares her experience in promoting SafeSend to her peers.

"I've had calls where I've convinced somebody on the call into going with SafeSend. There's absolutely no learning curve. It's very straightforward. It is one of the first software packages I've ever seen that is a great experience for the client and a great experience for the accounting firm. It's a win-win for everybody. SafeSend has great training as well—we use that all the time."

Saving More Than Time

Obtaining signed documents from clients is a crucial aspect of the tax engagement process. The mail merge feature in SafeSend One not only saves an enormous amount of time when sending out engagement letters but also has a significant financial implications and provides added convenience.

"It doesn't cost as much with SafeSend as it would cost if you used an Adobe Acrobat Sign , for example," Young says. "With Adobe Acrobat Sign we had to decide up front how many we were going to use for the year and pay for them, and they don't roll forward. You lose them if you don't use them.

"Going through SafeSend, it doesn't cost you anything extra with SafeSend One. With SafeSend, you buy your returns, and they roll over to the next year."

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Everything in One Place

When dealing with numerous documents requiring signatures and a team of admin members managing the workload, the potential for juggling and document oversight is high. SafeSend One offers a centralized location for all documents, facilitating collaborative work among admin teams and reducing the risk of documents slipping through the cracks.

"We sent all our letters out through SafeSend One and that made it super easy. We loved it," Young says. "We used the mail merge tool. I mass sent our master services engagement letters, our statement of work letters, and our 7216 offshore disclosure letters for 1040 clients—which has to be signed by both taxpayers. We got those back very easily; it made it so much easier for us.

"If I'm out, somebody can go in there where my letters are. They can send reminders, they can download everything. That's the other thing that's beautiful about it. I don't have to worry about something being trapped in my e-mail. It's out there in SafeSend.

"I trained a new person on how to use SafeSend. She's never really processed tax returns. I explained everything and went through it. She can just save and close it, and I can open it up and do a quick quality control. I love it."

SafeSend Understands What Firms Need

"You've thought through everything," Young says about her experience with SafeSend and SafeSend One.

That's the feeling firms have with SafeSend, and especially their Customer Success Managers—many of whom worked in admin roles at firms prior to joining SafeSend.

"The great thing about [our Customer Success Manager] is that she was an admin too," Young says. "We met at a conference. We were talking and realized we used a lot of the same software. Then, lo and behold, she starts working for SafeSend! It's been great to have her do training with us. Being an admin herself, she totally gets it. She gets what we need. She understands the things that are happening and how to make things more efficient."

What initially began as a search to find a solution for streamlining their 1040 delivery process has evolved into a comprehensive solution that helps BMSS automate the tax process—from gathering all they need to be tax ready to the assembly, delivery, tracking, finalizing, and filing.

"SafeSend is always looking for new ways to serve the accounting world and the accounting world's clients," Young concludes. "They aren't rolling out anything until it's ready, and then it's a, 'Wow! This makes a huge difference.'"

"That's right. SafeSend has the 'Wow!' Factor."

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About SafeSend®

SafeSend's mission is to solve real-world firm problems through innovative automation technologies. We help tax and accounting practitioners work more efficiently and serve their clients better, while making their lives easier and work more enjoyable.

SafeSend offers several foundational automation software solutions within SafeSend One™.
Our tax returns product is a multi-year winner of the CPA Practice Advisor Technology Innovation Award and has redefined the way accounting firms assemble, deliver, and capture e-signatures from clients for completed tax return packages.

Visit safesend.com to learn more about our technology solutions.

About SafeSend One™

SafeSend One is the end-to-end solution that automates the entire tax process, from gathering to delivery, offering firms an all-in-one solution to provide an unrivaled client experience. A secure and easy-to- use product for engagement letters, file transfers, organizers, e-signatures, and tax return assembly and delivery, now with a new and innovative AI- driven gathering capability.

Visit the SafeSend One page of our website to learn more about automating your tax engagement workflow and **schedule a demo!**

For more information, visit safesend.com.

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