



Case Study:  
Digital Tax  
Workflow

Tax & Accounting

*A Profitable Tax Season  
without the Burn-Out:  
Graydon Thompson CPAs  
Discovers a Happier Balance*

# *A paperless, all-digital tax workflow with CCH Axxess raised efficiency while reducing the long hours needed to complete tax season.*

## Graydon Thompson CPAs Key Data

- Headquartered in Greenville, South Carolina
- 7 employees
- Specializing in tax planning and compliance, audit and assurance, business advisory, and small business services
- Member of AICPA and South Carolina Association of CPAs, QuickBooks® ProAdvisor
- Solutions: CCH Axxess™ Tax, CCH Axxess™ Document, CCH Axxess™ Portal, CCH Axxess™ Practice, CCH Axxess™ Workstream, CCH® ProSystem fx® Scan with AutoFlow Technology, and CCH® ProSystem fx® Engagement

**“If people are still working 80 hours per week during tax season, they are doing it wrong,” quipped Phyllis Graydon, CPA and Tax Partner at her firm, Graydon Thompson CPAs. She and her firm discovered the key to unlocking a better work/life balance in the form of a highly-efficient, completely digital tax workflow achieved with CCH Axxess™.**

When Phyllis Graydon and Greg Thompson decided to launch their own small firm, each brought decades of experience — Graydon in tax and Thompson in assurance and advisory services. Both were committed to creating a firm that demonstrated the values of integrity, empowerment, commitment and service excellence.

The challenge in a smaller firm lies in finding ways to offer clients outstanding, personalized service while competing with larger firms on price. While large firms can delegate tasks and responsibilities a lot during the busy tax season, Graydon Thompson employees had to wear many hats and work very long hours. Graydon wanted to use technology to increase efficiency and lower tax season burnout amongst her staff.

*“With a digital tax workflow, we aren’t limited by traditional CPA work hours. In my earlier career, I thought if I went home at midnight on Friday, it was still early enough to go do something. That’s nuts!”*

— Phyllis Graydon, CPA  
Tax Partner  
Graydon Thompson CPAs



**Digital Tax Workflow Slashes Data Entry and Helps Preparers Focus on What Matters**

“In smaller firms, it’s harder to get leverage,” explained Graydon. “There is compression on staff because we don’t have a preparer and then a reviewer and then another reviewer. During tax season, we’re all ditch diggers. Everybody’s got to prepare; everybody’s got to review. We all share in that workload.”

CCH Access enables Graydon Thompson to shift more of the tax prep and workflow process to administrative employees, so CPAs can exclusively focus on preparing and reviewing. Now, an admin scans client documents with CCH ProSystem fx Scan and AutoFlow technology sends the information to the right places in the appropriate tax forms. By the time CPAs work on returns, their workpapers have been automatically created and they can spend their time thinking about how to solve problems for the client.

“The digital tax workflow allows us to spend our time putting thought into what we are doing and why, so we can benefit our clients better.”

When a preparer finishes a tax return, it gets saved in CCH Access Document and is automatically routed through the review process by CCH Access Workstream. To deliver the return, one click publishes it to the client’s online portal in CCH Access Portal, where the client and accountant can exchange documents easily and securely.

*“Our CPAs are smart, educated, credentialed people. The last thing they want to do is sit and type data off a 1040, W2 or 1099.*

*As younger generations enter the profession, they try to figure out how to get into important roles faster.*

*CCH® ProSystem fx® Scan with AutoFlow Technology takes away manual data entry.”*



Phyllis Graydon, CPA  
Tax Partner  
Graydon Thompson CPAs  
Greenville, South Carolina

*“From a productivity standpoint, I don’t even know how to explain what this did to our firm. When we went paperless, there were sixteen of us. My revenues doubled and now I have six people and we don’t even work until 6:30 anymore.”*



#### **Revenues Doubled after Firm Went Paperless**

Seven years before Graydon Thompson moved to the Cloud with CCH Axxess, they transitioned to a fully digital, paperless tax workflow with CCH ProSystem fx solutions. The firm was an early implementer of scanning and document management, and they digitized every client file. In the process, they were able to get rid of 85 file cabinets and free up a lot of office space.

Becoming a paperless firm added tremendous efficiency. During the first year of paperless tax operations, Graydon carefully studied the time involved in receiving and digitizing client documents to distribute information to the 1040.

“The first year that we implemented Scan with AutoFlow Technology, it took our admin about 12 to 15 minutes to scan a 1040 and AutoFlow the data,” recalled Graydon. “We saved 30 minutes on each return previously spent copying and making more papers. Our clients don’t pay us for that kind of work; they pay us for what we know. By eliminating that time, we increased efficiency.”

*“After going paperless, what we cut in work hours and gained in the ability to serve our client was monumental. It changed our whole tax practice.”*

### Leveraging Cloud Flexibility and Integration for Greater Benefits

After enjoying so much success with a digital tax process, Graydon was ready to take advantage of the additional benefits of cloud solutions, including added flexibility and additional time savings through integration. CCH Access features one central database that automatically shares information across the digital tax workflow, providing a single source of truth. Firm professionals can work at the office or at home thanks to secure, remote cloud access.

“Paperless is where the extreme efficiencies occur, but going to a cloud base just made everything that much easier,” she said. “And it’s all integrated.”

Graydon shared that CCH Access integration was its most important benefit. It saves time in dozens of ways. For example:

- When a preparer updates the address on a client’s tax return, CCH Access automatically changes that address in the Practice billing system.
- Clicking on ‘print’ in Tax automatically publishes and organizes the electronic return in Document.
- When a trial balance gets updated in the Engagement solution, it’s also automatically updated on the business return.

While some firms were slow to adopt cloud solutions, citing concerns over cybersecurity or AI, Graydon immediately saw the potential for major disruption in the accounting industry. CCH Access offers a great equalizer for smaller firms — the ability to benefit from the same sophisticated, integrated solutions used by larger firms, without the headache and expense of maintaining IT infrastructure.

*“I believe our data is more secure in the cloud because the security that Wolters Kluwer can pay to implement is better than anything I could accomplish,” reasoned Graydon. “My outside IT consultant doesn’t even have access to data anymore, because there’s no client data on my server.”*

*“The ease of access allows you to work anywhere, anytime, anyplace. If you want to take an extended vacation and stay connected, CCH Access allows for that. We were able to get rid of space in our office and get rid of technology and stop worrying about server updates. It was almost a no-brainer for us.”*

*“Our selling point to clients is that we’re not tired on April 15th because we haven’t worked that much. We don’t spend our time typing tax returns and copying your documents — we are looking at your tax stub trying to figure out how to take advantage of new tax laws to save you money.”*

#### **Saying Goodbye to the Last Piece of Paper in the Office**

Although the firm was fully automated with CCH Access, one piece of paper continued to haunt the Graydon Thompson offices — the paper routing sheet. Graydon was determined to leverage the complete benefits of cloud-based project management in her tax workflow.

CCH Access Workstream simplifies work tracking with built-in administrative workflow tools to monitor due dates, manage projects and track status through electronic route

sheets. It enhances client service by providing greater visibility for both partners and staff. It also increases accountability with dashboards and notifications that keep everyone informed.

Graydon recalls, “We finally told the team, ‘You have to use Workstream, because we’re getting rid of this piece of paper in June. So say bye, because we’re not doing it anymore.’” Now, she can track how tax returns move through the firm, and those same returns cannot fall through the cracks during the preparation and review process.

*“The efficiency we gained with CCH Access allowed us to do more work for our clients and allowed the time spent to be more beneficial for the client. Now, we can look at tax planning while we finish a return or consider alternatives to tax situations in a tax return.”*



*“CCH Access allowed us to reduce our workload and work hours so that we weren’t burning people out during tax season. We don’t have mandatory Saturdays; we don’t work on Sundays. We go home for dinner. We do things with our children.”*

### **Less Stress, Less Strain during Busy Tax Seasons**

Like any tax practice, Graydon Thompson’s workload spikes in March and April. The challenge for firm management is pushing through the busy season without burning out good employees. From a profitability perspective, partners would like to work efficiently and effectively for clients, utilizing their regular, full-time experienced professionals.

CCH Access helps improve staff utilization by removing the ‘busy work’ from the tax season and by automating all of the routine tasks that bog down the tax preparation process. It eliminates data entry, photocopying and filing while automating routing approvals and client document exchange.

“In our business, everything is due in March and April. I have to find a way to complete that work without killing my people,” said Graydon. “I’ve got to buy a year’s worth of

their time. What are they are going to do the rest of the year? The efficiency of CCH Access lets us operate with a leaner staff but still not overburden them. It frees us up to do other things, like business development and community service.”

Graydon understands not all tax professionals feel ready for cloud-based automation, but she believes cloud solutions are the key to helping employees have better lives and more freedom through flexibility.

“The right people for our team are those who want to work this way,” she said. “Go home for dinner. Take work with you and leave at four o’clock to go to a baseball game. You can enter your time from an iPad®. You can do your billing after you have fed your children and put them to bed, and spent some quality family time. CCH Access gives you the flexibility to work where and when you want to, assuming client requirements are met.”

*“My goal is to be the CPA firm that lets people work sixty hours a week, or less, during tax season. We’ve accomplished that with CCH Access.”*

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Please visit [EngageTax.WoltersKluwer.com/DigitalTaxWorkflow](https://EngageTax.WoltersKluwer.com/DigitalTaxWorkflow)  
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