

# LACERTE

## Lacerte Ease-of-Use and Seamless Integration Helps Accounting/Tax Firm Support Clients Expecting a Higher Level of Service

### BUSINESS CHALLENGE

When Jim McClafin found himself without a partner for his accounting and tax practice, he elected to press on alone. In order to grow his business, Jim knew he had to be more productive if he was going to be able to offer his clients the higher level of service they expected, and to set himself apart from the many tax preparation franchises that had set up shop in his region.

### SOLUTION

- QuickBooks: Premier Accountant Edition
- Lacerte Tax Software
- Lacerte Tax Planner
- Lacerte Document Management System

### BENEFITS

- Able to work with all clients' QuickBooks files to generate industry-specific reports, and to quickly transfer data to Lacerte Tax with the built-in QuickMapping feature.
- Produces over 1,300 individual tax returns, plus corporation, s-corporation and fiduciary returns effortlessly using his staff of seasonal tax workers.
- Can create detailed tax liability plans with multiple "what-if" scenarios for clients in seconds to help them make better informed financial decisions.
- Keeps large amounts of client data and paperwork neatly organized and instantly retrievable, and offers clients their tax data and documents on CD-ROM as an optional service.

### CUSTOMER PROFILE

- Sole Practitioner.
- In practice since 1997.
- Approximately 1,300 individual tax clients, plus small business owners, executives and independent professionals.
- Has up to 22 seasonal workers helping during height of tax season.
- Using Lacerte Tax, Document Management System, Tax Planner, and QuickBooks: Premier Accountant Edition.

*"There are a lot of little things in Lacerte that the clients don't see, but makes my life a whole lot easier. They like the output that I provide, and they're amazed at the speed with which we can get an answer for them. They don't know that it's Lacerte that's getting the answer, they just know that I'm capable of doing it quickly."*

Jim McClafin, CPA  
Grimes, IA

Helping people. That's what Jim McClafin, owner of Accounting and Tax Professionals, PLC loves most about his job. Helping his clients understand their tax situation, and having them know that they have an advocate if they need help or have a question is what makes it all worthwhile. Jim uses a mini suite of Lacerte® and QuickBooks® products to run his growing practice smoothly, and take care of those clients looking for a higher level of service than they could get from the national tax preparation franchises that were sprouting up everywhere. It's this more personal service—one that includes accuracy, fast delivery, and being able to handle a wide variety of customer needs—that sets Jim apart from the giants and enables him to thrive.

When Jim and his partner opened their doors in 1997, they looked at several tax software packages for one to use in their business. Although Lacerte was their first choice, for various reasons they went with a competitor. A year later the competitor was acquired by Intuit and the partners were offered the opportunity to move over either to ProSeries® or Lacerte and they quickly selected Lacerte—which had been their first choice from the beginning. In 2000, when a client lured his partner away, Jim decided to go it alone and decided to keep Lacerte due to its abilities to make him more productive by smoothing his workflow, increasing his accuracy and turning out more professional-looking results. Today, he runs a thriving full service practice that utilizes the skills of 22 seasonal workers, including seven tax preparers. He credits his collection of Lacerte and QuickBooks products for helping him generate revenue year 'round, not just with tax work, but with accounting, bookkeeping, payroll services and more—and giving him an avenue towards opening a second location in a neighboring town as soon as this year.

### A Sizeable Amount of Business and Looking for More

Jim's office is located in Grimes, Iowa; a community of 13,000 that combines the charms of a small town with access to the big city conveniences of nearby Des Moines. It's this small town character that Jim's clients like, and why they seek him out for many of their business and financial needs. Lacerte and QuickBooks products help him a lot.

"When it comes to financial, business and planning advice, a lot of people don't know where to go to get those types of services," Jim says, "so, they usually start with the person who does their taxes. I get a lot of business start-ups and people with financial planning questions, for example. Lacerte and QuickBooks give me the tools to work with these folks and get them the answers they need quickly—without the necessity and expense of going to a big CPA firm. My QuickBooks Certified ProAdvisor status has also helped bring in a boatload of new customers recently who want everything in the way of services."

### Efficiency and Productivity in Everything

According to Jim, the biggest concern he had about growing his practice was how to make it more efficient; how he could work better—without adding costly overhead. With nearly 1,300 tax returns to prepare each year, for him, Lacerte and QuickBooks: Premier Accountant Edition have proven to be the right solution, offering him ease-of-use, stable product integration, and functionality that helps him and his team do more for his clients—and gain more clients in the process.

Seamless product connectivity enables Jim to import his clients' QuickBooks data directly into Lacerte and prepare returns swiftly and accurately without having to re-enter data. And Lacerte's

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legendary ease-of-use has been a real boon when it comes to bringing his seasonal tax workers back up to speed after hiatus, and when training new staff. “I’ve had people come to me from H & R Block, which uses form-driven software,” Jim says, “they take one look at Lacerte’s data-driven format and they can’t believe how much easier it is to use. They pick it up in no time.”

That reliable product integration also plays another key roll in Jim’s ability to provide “winning” service to his clientele. When someone takes a new job, is expecting a large bonus, or considering a major purchase, Jim can pull their current tax return into Lacerte Tax Planner and provide several tax liability scenarios in a matter of seconds. Yet despite the immense value of this service, he offers it without charge. “I consider it a part of my overall service,” he says. “People expect and offer to pay for it, and when I tell them there’s no charge, well, it’s one of those little things that keeps them coming back.”

### ***Taking the Pain out of Growth, and Providing the Opportunity to offer yet Another Service***

With his practice taking off, Jim found himself looking at more and more client documents being stored in his office.

“Storage gets to be an issue as you grow,” he says. “When you see filing cabinets starting to multiply, you become concerned about where you’re going to put the next one. When I was in the computer industry, there was a big push towards paperless document management, so I already had experience with it. For me, when Lacerte’s Document Management System came along, I thought, ‘It’s about time!’ I called my Lacerte account manager, and he told me stories about other Lacerte customers who were having a lot of success going paperless with DMS. So, we jumped on it. During the off-season we scanned everything, and we literally cleared out our cabinets. DMS is very easy to use and integrates completely with Lacerte Tax, plus the ease with which we can add outside documents has been extremely helpful.”

Something else Jim likes about DMS is the way it enables him to respond more quickly to client requests for information. When a client calls and needs copies of their W-2s, for example, he can just type a few keys on his keyboard, and then fax or email the information—without even leaving his desk. No longer does he have to spend valuable hours digging through jam-packed filing cabinets looking for information to fill a request—time he can better use elsewhere in managing his growing business.

The one function in DMS whose popularity surprised Jim, however (and freed him to do other things), was the ability to burn scanned client tax documents and electronic data direct to CDs. “I was surprised at how many people elected that option this year,” he says. “It’s been very well-received. Now, my clients don’t have to store a big folder stuffed with papers. They can keep everything on one CD. And we don’t have to spend as many hours assembling client packages as we used to. As I go forward with plans to expand the practice, that option will grow even more. I don’t see many of my competitors offering that level of convenience, so it’s become a real business advantage for me.”

For Jim, Lacerte and QuickBooks form the perfect solution to give his clients more than they expect, while at the same time enabling him and his staff more productive every year. It makes for an all-around win-win situation.

### ***Helping Build Your Business***

For more than 20 years, Lacerte and QuickBooks have worked with accounting and tax professionals to develop tools that will help them succeed. Lacerte received an overall rating of 5 out of 5 stars from CPA Technology Advisor and was rated at the top of its’ class by AICPA Journal of Accountancy, while QuickBooks software has won PC Magazine’s “Best of the Year” Award.

### **The Lacerte family of products and QuickBooks: Premier Accountant Edition enables Jim McClafin and his large seasonal staff to:**

- Prepare large numbers of individual 1040, corporation, and s-corporation tax returns quickly and precisely.
- Pull client data from 2005 Lacerte tax returns and quickly create detailed scenarios that enable clients see how a new job, an expected bonus, or major sale or purchase can affect their tax liability.
- Capture client information and documents digitally and store neatly on office computers for fast, easy retrieval and greatly reduce the number of space-robbing filing cabinets.
- Export client tax data and documents on CD-ROM instead of creating bulky folders for clients to store.

## FOR MORE INFORMATION

For more information about Lacerte software products, visit [www.lacertesoftware.com](http://www.lacertesoftware.com) or call (800) 669-7953. For QuickBooks products and services, visit [www.quickbooks.com](http://www.quickbooks.com), or call QuickBooks Sales at (866) 272-8735, ext. 2006.

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