



FROM PAPER-BASED TO DIGITAL: TRANSFORMING 1040 TAX PREPARATION WITH AUTOMATION

Beasley, Mitchell, & Co.

A SUREPREP CUSTOMER SUCCESS STORY

Beasley, Mitchell & Co. Share Their Firm's Story

Interviewed: Brad Beasley, CPA, CGMA, Partner,
Beasley, Mitchell & Co.



Beasley, Mitchell & Co.
Certified Public Accountants

Stats at a Glance

Goals: Paperless, Standardization,
Automate 1040 tax preparation.

Results: Time spent reviewing tax
returns was reduced by up to 60%.

Office location: Las Cruces, NM

Employees: About 70

Website: bmc-cpa.com

Associations: AICPA, CPAmerica, Inc.

Technology of choice: [1040SCAN](#),
[SPbinder](#), UltraTax

The limits of a tried and true paper-based workflow

“Everybody talked about all the different and amazing things that they were doing with paperless and I would ask the million-dollar question: But are you more efficient? Why would I change?”

For many years, Beasley, Mitchell & Co. had a proven, paper-based 1040 tax return preparation system in place. The process started with a snail-mailed paper organizer sent to clients. Once the paper source documents were received, file folders with routing sheets were created to facilitate the fully paper-based preparation and review. After the return was finalized and out the door, interns from New Mexico State University would scan the paper documents and manually assemble the PDF workpapers for storage.

Eventually, however, the firm reached a point where they decided it was time to make the leap into the digital age. During their search for solutions in 2016, Network Management Group Inc., the firm’s managed IT service provider, referred them to SurePrep. They have been utilizing [1040SCAN PRO](#) and [SPbinder](#) ever since.

“SPbinder allows junior staff to **quickly prepare workpapers and even do a first level review.**”

- Brad Beasley

“We decided that we needed to keep up with the times and the technology of SurePrep seemed far superior than anybody else we had looked at in the market,” said Partner Brad Beasley. “We felt that this was an opportunity for us to make a shift.”

Increasing Efficiency and Client Satisfaction, and Reducing Staff Turnover

Brad’s initial skepticism about the efficiency of a paperless 1040 workflow quickly vanished once the firm became a SurePrep customer. 1040SCAN PRO, SurePrep’s scan-and-populate solution, has allowed the firm

to eliminate their paper-based processes and automate much of the workpaper preparation and data entry. The automation of 1040SCAN PRO has eased the workload for preparers and empowered them to move at a much quicker pace. SPbinder, SurePrep's paperless tax workpaper system, allows junior staff to quickly prepare workpapers and even do a first level review, thereby elevating their roles in the office. The firm even ran into situations where returns processed through 1040SCAN PRO had such quick turnaround that the client was in disbelief and assumed there had to be some sort of mistake.

**"As partners,
we're probably
reviewing 40%
less of the 1040s
because we can
push the review
level down to
a supervisor or
manager."**

- Brad Beasley

Making the transition to an automated 1040 tax preparation workflow has saved considerable time at the partner level as well. Having a fully cross-referenced and bookmarked electronic tax file has given Brad the ability to quickly access documents from any location. Furthermore, having multiple levels of verification and sign-offs have given Brad peace of mind that numbers are not transposed. SPbinder has dramatically reduced the time he spends reviewing returns, which allows him to focus on partner duties.

"As partners, we're probably reviewing 40% less of the 1040s because we can push the review level down to a supervisor or manager," Brad said. "And where I would usually spend 15, 20, 30 minutes looking at a return, now I'm spending 5 to 10."

While it's common for CPA firms to have difficulty recruiting and retaining a full team of talented tax professionals, Beasley Mitchell & Co. has found that their improved efficiency has decreased their need for new incoming staff. And when they do need to hire, SurePrep's solutions make the firm more attractive since the software helps position the firm as forward-thinking and technologically driven.

“And where I would usually spend **15, 20, 30 minutes** looking at a return, **now I’m spending 5 to 10.”**

- Brad Beasley

Minimizing 1040 tax workload compression and resistance to change

At first, making the change to 1040 tax document automation was met with some hesitation by partners and senior managers who had grown accustomed to their previous process. However, once the firm showed increased productivity with its new automated workflow, the hesitation quickly dissipated and was replaced with enthusiasm.

“When people realize how this tool can work and how it empowers a lot more work

being done by the junior staff, letting them get a lot further along on a lot of these tax returns, [they] realize that this is a good thing,” Brad said.

To ensure that everyone is on the same page and utilizing 1040SCAN PRO and SPbinder to their full potential, Beasley, Mitchell & Co. regularly surveys the tax team for questions, suggestions, and comments. In doing so, Brad notes that they are continually discovering new tricks and shortcuts that 1040SCAN PRO and SPbinder offer, which keeps their staff engaged with high-yield learning opportunities. When someone learns a new “power user” function, that

“When people realize [...] how it **empowers a lot more work being done by the junior staff**, [...] [they] realize that this is a good thing.”

- Brad Beasley

knowledge spreads quickly throughout the office.

Final Words

In a professional services industry like tax and accounting, firms sometimes focus so fully on their clients that they overlook their own internal needs. Brad believes that SurePrep's solutions provide the internal structure and standardization that allows firms to become more efficient, thereby freeing up time for better client service.

"SurePrep allows you to actually run your CPA firm like a business," Brad explained.

"I can get twice as many returns out with less cost."

Though Beasley, Mitchell & Co. were initially doubtful that an automated and paperless 1040 process could outdo the paper-based system they had spent years perfecting, switching to 1040SCAN PRO and SPbinder has helped them accomplish exactly that. They are now a faster, more efficient firm that's better suited for the digital age.

"It works fantastic. For what we need it to do, SurePrep does an absolutely amazing job and I just don't see how we could go back to manually [preparing returns]."

"SurePrep allows you to actually run your CPA firm like a business. **I can get twice as many returns out with less cost.**"

- Brad Beasley

About SurePrep

SurePrep was founded in 2002 and is the leader in 1040 productivity for CPA firms. We deliver seamless integration with your existing tax software to automate and streamline the entire 1040 process for both the taxpayer and CPA. Our solutions are used by over 20,000 tax professionals ranging from Big 4 firms to sole practitioners to reduce administrative costs, automate workpaper preparation, maximize review efficiency, and improve client service.

2023.02.23