



WHITE PAPER

From burnout to balance, saving time,
and sourcing talent: Transform your digital
workflow with Intuit® ProConnect™ Tax

Intuit Accountants



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Executive summary

Filing taxes for individual and small business clients doesn't have to be a drain on your firm's time, energy, and resources. But all too often, tax season means long hours, frustration, and burnout. For today's firms, continuing with "business as usual" might mean:

- Collecting paper documents and using multiple software programs, leading to data entry errors, complex workflows, and wasted time.
- Struggling to recruit and retain high-quality employees.
- Wrestling with sky-high tax season burnout and subpar work-life balance.

During the Intuit Accountants "Better Together" event in New York City, we brought together tax professionals and industry thought leaders. Our panel of industry tax experts discussed the importance of embracing technology, and modernizing tax and advisory firms to address the challenges and inefficiencies they face during tax season and in their day-to-day operations.

Key issues highlighted in this whitepaper

Inefficient and traditional processes:

Many tax and advisory firms continue to rely on paper documents and multiple software programs, leading to data entry errors, complex workflows, and wasted time. This outdated approach is a drain on time and resources.

Talent recruitment and retention challenges:

Firms struggle to recruit and retain high-quality employees, an issue exacerbated by the demands of tax season and high levels of burnout among professionals.

Tax season burnout: Work-life balance and overall job satisfaction are real and valid concerns in firms. As the demand for talent and productivity continues to rise, these issues are not likely to go away.

Modernizing firms: The overarching theme is that firms need to adopt modern, cloud-based

technology solutions to improve efficiency, reduce stress and burnout, attract and retain talent, and ultimately enhance the quality of their services, all while increasing revenue.

Technological solutions: Among other technologies, Intuit ProConnect Tax provides a practical and workable solution. This whitepaper highlights the software's ability to streamline workflows, reduce data entry errors, save time, and integrate with other Intuit software, including QuickBooks® Online Accountant.

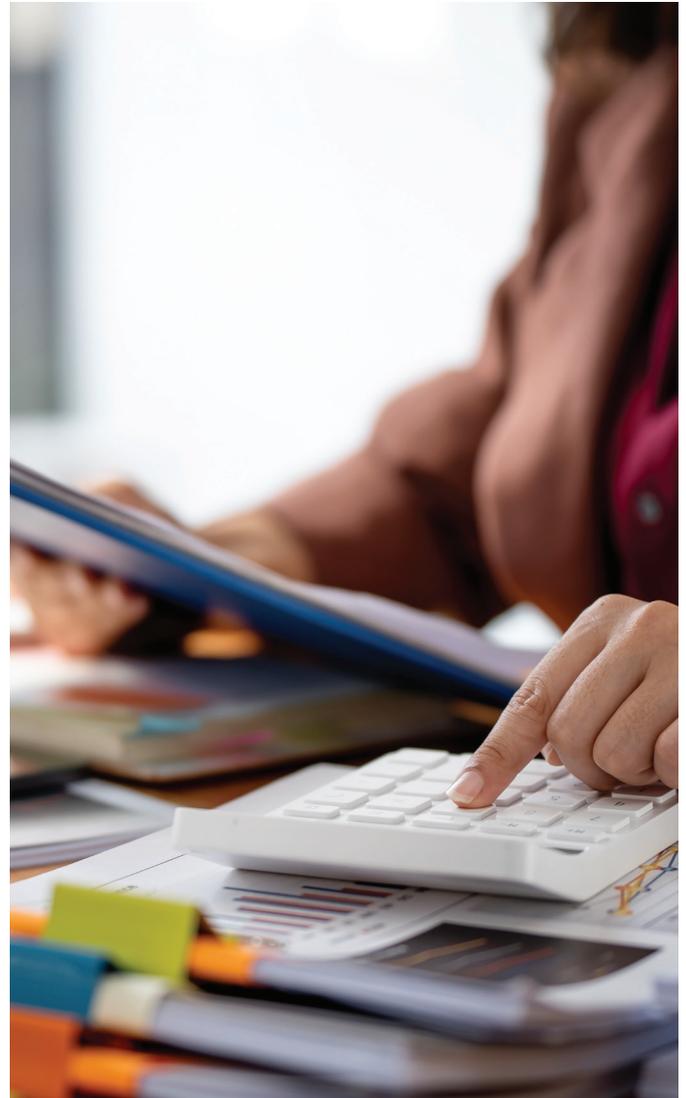
In this whitepaper, discover solutions for these issues—and more. Learn how ProConnect Tax modernizes your firm, saves you time, integrates with other Intuit software, including QuickBooks Online Accountant, and even helps you recruit and retain talent for your firm.

The problem: “Business as usual” doesn’t cut it for modern firms

Paperwork and storage. Data entry and manual processes. Redundant and draining tasks that eat away at a tax professional’s time and energy. For many, this is “business as usual” at their firm. If this sounds like your firm, you’re not alone.

Tax and advisory firms often have complex workflows that involve using multiple software programs to get the day’s work done. The average knowledge worker uses 10 different apps each day, according to Asana’s 2023 Anatomy of Work Global Index.¹ That creates real damage: People report spending 36 minutes switching between applications each day, and almost another 10 minutes getting back into their groove once they’ve switched between apps, according to 2021 research from Qatalog and Cornell University’s Ellis Idea Lab.²

CPAs, EAs, tax preparers, and consultants have shared other issues that plague their firms when they collect paper documents from their clients. The process of notifying clients about the process, explaining which documents the firm needs, and chasing down the documents is frustrating and time consuming. Client accountability can prove to be low for the needed forms and paperwork to accurately file their taxes. Data entry errors are nearly inevitable when entering information manually—not often a fan-favorite task of the job. At this point, it’s your firm’s responsibility to store the requisite paperwork on your own server or in a physical filing cabinet.



“Being able to really fully embrace the technology that’s out there, investing your time into learning it, and learning all the different functionality is going to set you apart because you’ll have the technical skills.”

– **Shahab Maslehati, Seed Money Consulting**

Among knowledge workers, repetitive mundane tasks such as data entry and filing make up 62% of their workday, according to the Anatomy of Global Work Index.¹ These might be among the tasks traditionally assigned to newer members of the profession, such as recent college graduates, or simply may be a seemingly unavoidable part of the job. But it's likely a contributing factor to recent problems with attracting new talent, hiring, retaining qualified employees, and even quiet quitting. In fact, 90% of accountants reported hiring challenges over the past year, according to the 2023 Intuit QuickBooks Accountant Technology Survey;³ 94% said one of the biggest obstacles is fewer graduates joining the profession.

"It is my personal mission to create the thought that you do not have to be burned out to be successful."

– **Al-Nesha Jones, ASE Group**



The issues with the recruiting pool hurting firms aren't the only obstacles. In the same survey, although 69% of accounting professionals said they were satisfied with their jobs, 32% were dissatisfied with their job's stress level. And the stress isn't a well-kept secret. A full 93% of accountants said that tax season burnout is a big challenge to attracting and/or retaining accounting talent. Another two in five reported they were not satisfied with their workloads.

For tax professionals and their firms, the high stress and workloads are unsustainable to stay in the field. Chris Picciurro, founder of Teaching Tax Flow, articulated the high cost of demanding accounting jobs.

"Honestly, I missed the first five years of my older kids' lives," Picciurro told an audience of accounting professionals during Intuit's Better Together NYC event. "At that point, I said, 'It's them or me.' I was driving home—it was probably 2 am—from our office, and I thought, 'What the heck is going on? It's a very lucrative job, but it's not a job I want anymore.' And I felt like this business is built based on me running it—not processes and not systems. So something has to change."

It was a pivotal moment that led to the right-sizing of Picciurro's firm. With streamlined software solutions that facilitated efficient processes and logical systems, change is exactly what he did.



The solution: Why Intuit ProConnect Tax is different from other cloud-based tax software

Piccurio completely overhauled his firm's structure, services, and systems to make it work for his personal and professional life. The pivot was life changing. Today, he has a successful, satisfying work life that's balanced with his family life. He sees the opportunity for new generations of accounting professionals to have well-balanced, gratifying careers.

"I hope that we get more people into the industry that see how rewarding it is and see, truly, the difference you make in your clients' lives," he said.

Among the technological solutions Piccurio implemented to keep his work life in check was ProConnect Tax.

"Any piece of our technology stack has to be cloud-based ... it prevents us from losing efficiencies based on our hardware or our computers, and that is huge."

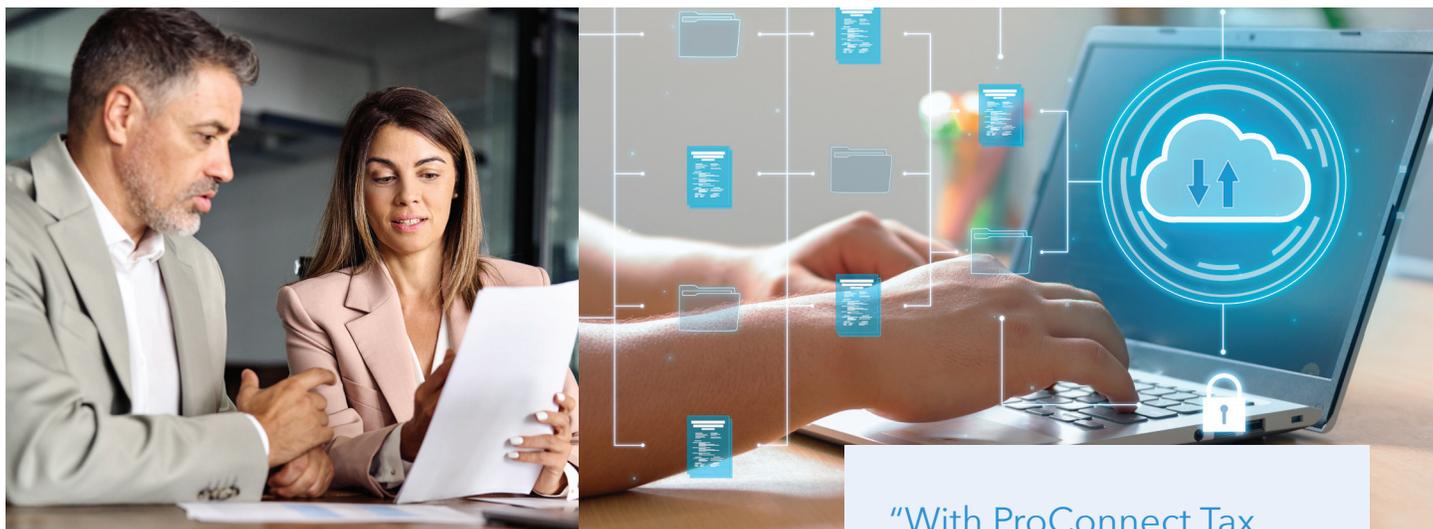
– **Chris Picciurro, Integrated Financial Group**

This cloud-based professional tax software allows you to create tax returns in minutes, from anywhere. As an Intuit product, it seamlessly integrates with QuickBooks Online Accountant—the go-to software when working with a business owner's books. Add on Intuit Tax Advisor, an integrated advisory tool that automatically generates strategies for client tax savings, and you come full circle from tax prep to tax planning.

"This is just the natural flow of data," said ASE Group Founder Al-Nesha Jones, CPA, MBA, MOM, whose practice has used Intuit products since she opened her firm. "We don't do tax returns if we don't do the bookkeeping, because everybody knows without bookkeeping, it's probably a mess. It's a natural progression to go from QuickBooks to ProConnect Tax."

The integrated flow among these bookkeeping and tax software solutions reduces the number of applications tax professionals need to use during busy season and, of course, throughout the year. After all, tax advisory isn't a once-a-year occurrence. For a firm, the combination of software allows for smart, simplified practice management. Accountants who use technology solutions say that they're better organized (31%), do less manual work (28%), and have fewer errors (27%), according to the QuickBooks Accountant Technology Survey.³

"When I'm using an integrated tool, I'm just streamlining things," Jones said. "I'm reducing the chance for error, reducing data entry, and reducing my time."



Notable features in ProConnect Tax

Intuitive features embedded in ProConnect—such as flags, imports, automations, and cloud storage—plus Intuit Link, eSignature, and Protection Plus, are among the integrations that save Intuit ProConnect Tax users money, mental energy, and time.

"With ProConnect Tax, everything is in one place. I'm able to accomplish what I previously needed 4-5 other software subscriptions to do."

– **Al-Nesha Jones, ASE Group**

"It's the way that I'm able to take what I would have needed with four to five other subscriptions to do what I do—and it's just all included in one place," Jones said. "It just saves so much time per tax return."

With the time savings, firm owners and accounting professionals are able to direct their energy elsewhere, whether it's getting more time at home or engaging with clients in high-value interactions. In fact, 80% of accountants say that technology is freeing them up to spend more

face-to-face time with clients, according to the QuickBooks Accountant Technology Survey.³ And 82% of accountants say those personal interactions are more meaningful.

Many accountants report that technology helps them feel greater trust in the services they provide. Professional tax software such as ProConnect Tax includes intelligent automations when uploading client documents. In fact, one of the newest in-demand features, IRS Transcript direct access, allows you to pull all of your client's transcripts straight from the IRS into ProConnect Tax. With this feature, you can:

- Catch and fix errors proactively before your client gets an IRS notice.
- Get a single source of truth to double check before you file, so you don't miss a thing.
- Complete tax returns faster and more accurately with less client back-and-forth conversations.
- Access the latest client IRS financials; this is helpful for onboarding new clients, resolution work, and completing extensions.

Solutions that integrate with ProConnect Tax

Synergies across the Intuit suite of software aren't the only integrations that save time and money for firms. ProConnect Tax includes Intuit Link, a cloud-hosted portal that gathers and manages clients' tax documents and data. An overwhelming 92% of ProConnect Tax customers who used Intuit Link to complete tax returns for tax year 2021 said they saved, on average, 43 minutes per return. Tax preparers can flag missing data, estimates, and fields needing review within ProConnect Tax. Instead of typing emails manually to notify clients of flags, your firm can send templated letters with preset and customized tax return data fields. Flagged items can be reviewed by clients and accounting professionals in an input drawer, which also houses imported documents, autofills tax document fields, and marks them for review.

When it's time to have clients sign contracts and tax documents, Intuit eSignature provides a quick and convenient way to request signatures. Rather than chasing down clients to sign in ink or using a third-party tool to request signatures, eSignature cuts to the chase to collect client signatures digitally and quickly. In fact, 69% of completed eSignature transactions through Intuit professional tax products were finalized in less than 24 hours during tax year 2021.

"Using eSignature, we don't have to set up the signature boxes on the e-file authorization forms. Combined with ProConnect Tax, we save 65 minutes on each return. It creates time for four-day workweeks!"

– **AI-Nesha Jones, ASE Group**

ProConnect Tax securely stores all the client documents, data, tax forms, and signatures. Intuit's cloud service keeps your firm's data safe with enhanced security measures and protection services. This isn't just a convenient way to save on costs and storage space in person or on your own hosting service; it's also meeting basic client expectations for the security and safety of their data. According to Intuit's survey of taxpayers who used a tax professional in the 12 months prior to June 2022, 86% of taxpayers expected their tax professional to store tax documents on encrypted servers with enterprise firewalls.

The same survey found that 78% of taxpayers would choose a tax professional who offers tax audit protection over one that doesn't. For example, Protection Plus is a low-cost option to add on to any ProConnect Tax returns your firm files. Protection Plus expands your team to include CPAs and EAs who work with your team to handle any notices, issues with IRS forms, and audits. They take care of the long phone calls with state or federal agencies to fully resolve any flagged issues.



Technology enables talent recruitment and retention

These kinds of smart automations, technological innovations, and delegation of rote manual tasks to technology pave the way for a more rewarding career in tax and accounting. In fact, 85% of accountants believed technology could encourage more young professionals to enter the industry by making way for more engaging work, according to the QuickBooks Accountant Technology Survey.³ It's a boon for employee retention, too; 31% cited a happier and more engaged staff because of their technology solutions. A third of accountants also credited their technology with improving employee retention and acquisition.

Technology solutions such as ProConnect Tax open up the hiring field and provide a built-in competitive advantage when recruiting new talent. Using cloud-based software rather than device-specific desktop solutions widens the talent pool from a small group of qualified individuals who can commute to your office to anyone in your state, time zone, or across the country. Remote work flexibility was preferred by nine out of 10 remote-capable employees, and eight in 10 chief human resources officers from Fortune 500 companies said they don't plan to decrease remote work flexibility in the next year, according to a report on Gallup's quarterly polling.⁴ ProConnect Tax facilitates remote work with access from any location and any device, and provides insight into time spent on returns at the firm and user level.

Of course, accounting professionals must address the bottom line. With technology, firms are clearly in the black. The #1 benefit of technology is that it's helping to boost revenue due to efficiency gains, 41% of accountants reported in the QuickBooks survey. More than a third said it is also increasing income streams.

But don't take our word for it; with ProConnect Tax's firm performance insights, you can track client growth and time savings for yourself.



Intuit ProConnect Tax Customer Q&As



Al-Nesha Jones

ASE Group

Founder, CPA, MBA, MOM

Firm name: ASE Group

Firm size: 4 employees

Location: Based in New Jersey, with a remote regional workforce

Primary services: Taxes, accounting, and advisory services

Q: How much time does ProConnect Tax save you?

A: "It creates time for four-day workweeks!"

(Learn how [ProConnect Tax](#) saves ASE Group 65 minutes per tax return)

Q: What makes ProConnect Tax work for you?

A: "When I'm using an integrated tool, I'm just streamlining things. I'm reducing the chance for error and reducing data entry, and it's reducing the time ... it all just plays into more efficiency, less data entry, and fewer errors. It means that you can serve your clients in a manner that matters."

Q: What benefits does your firm see from using Intuit's suite of tools?

A: "There is just the natural flow of data. When you are working with a small business client—that's the majority of our clients—you start with the books. We don't do tax returns if we don't do the bookkeeping, because everybody knows without bookkeeping, it's probably a mess. It's a natural progression to go from QuickBooks to ProConnect. We are also making things a lot easier by being able to be in a tax return and immediately go over to the tax plan in Intuit Tax Advisor. I don't have to download, upload, and change data. I can just immediately bring that in."

Q: What are the biggest benefits in using ProConnect tax at your firm?

A: "Initially, it was the live and recorded free training because I had not used another software. I came from the Big Four and Fortune 100 companies. I didn't start doing taxes until I started doing it in my own firm. Recently, however, it's been the number of software programs I don't need to purchase because everything is already in ProConnect Tax, so I don't have to purchase something for people to e-sign engagement letters, for example. I don't have to chase engagement letters. And it saves me so much, not just my time, but preparer time,

reviewer time, and admin time because it can send reminders to the client automatically. These updates that Intuit is making are preparing us to be more efficient and get things done with less human interaction so that our time is freed up for what only we could do—what a robot couldn't do as efficiently as a human!"

Q: [What do you envision for the future of the accounting profession?](#)

A: "It is my personal mission to create the thought that you do not have to be burned out to be successful. It's just not the way it has to be. So I love that this is the culture we're in. I love that the accounting profession as a whole is becoming more diverse. Once I decided I wanted a family, I started in a firm where I thought I didn't belong. So I love that I could tell you that I started this business with a 1-month-old and two other children."



Shahab Maslehati

Founder, Seed Money Consulting

Founder, CEO, COO, Advisor

Firm name: Seed Money Consulting

Firm size: 3 employees

Location: Colorado

Primary services: Taxes, financial planning, business services, and investment management

Q: What's the biggest benefit to using ProConnect Tax?

A: "The biggest benefit is the integration because it removes any kind of double entry and has the same consistent messaging throughout in the quality of the work product. With ProConnect Tax, you have industry-leading software behind your industry-leading practice.

"We want you to be the leaders and set the tone, and what makes it possible is a program like ProConnect Tax because you get the time savings, can take care of the complex stuff, and then the non-complex stuff, too. It's not just for the massive big tax returns either. Then you could seamlessly—boom—export it right to Intuit Tax Advisor, and then start talking about the hypotheticals in a separate engagement and start to set your clients apart from their peers. Because then, all of a sudden, they're going to start getting questions like, 'Oh my gosh, how are you so healthy in your financial life?'"

Q: What's important about having the most up-to-date, cloud-based tax software?

A: "ProConnect Tax is very easy and intuitive to just see how things are flowing, and to integrate across teams and even your own different laptops. The integration with QuickBooks Online and having everything in the cloud—trying to go back to anything other than having that flexibility—is just such a significant roadblock to our efficiencies, which really turns the economics of our transactions upside down.

"If you're not adopting the technology we have, your competition is using it. Clients are going to ask, 'Hey, why aren't we using AI here? How are you doing it?' And if we don't have good answers for that, that's where we lose a little bit of credibility."

Q: What do you want other firm owners to know about using ProConnect Tax with QuickBooks Online?

A: "Being able to really fully embrace the technology that's out there, investing your time into learning it, and learning all the different functionality is going to set you apart because you'll

have the technical skills. You'll then also be able to protect that client experience, which is so vital to your fees, to your culture that you're setting with your brand. You're able to always check throughout the process and see how those diagrams, and workflows between ProConnect Tax and QuickBooks protect each other. That's what helps you clock out at 5 o'clock. Integrating these two has been a total game changer. It allows us to confidently deliver a high-quality product without killing ourselves."

Q: [Beyond streamlining your tech, how does ProConnect help your firm be at its best?](#)

A: "Not only is the technology important and the support that Intuit gives you, but it also allows you to showcase your biggest strength, which is the human side. It is addition by subtraction. I'm definitely going to ride with Intuit because it's progressive, it's the standard, and the word's getting out."



Chris Picciurro

Founder, Teaching Tax Flow

Co-founder, CPA/PFS, MBA, ARA

Firm name: Integrated Financial Group

Firm size: 170 employees

Location: Based in Michigan, with a remote national workforce

Primary services: Real estate investment tax and advisory

Q: [Is ProConnect Tax robust enough to handle any tax return at your practice?](#)

A: “For us, yes ... we early-adopted ProConnect Tax seven years ago, and it’s grown so now it’s very robust. We have clients who are filing in many different states. Pretty much if a state or locality allows e-filing, then we can e-file there. So I feel like there’s no limitations. If we’re prospecting on our private CPA practice, I never have to think about, ‘Do we have the software, do we have the technology to actually deliver on the tax compliance part?’ So the fact that I don’t worry about it means it’s pretty robust.”

Q: [What do you value about ProConnect Tax from a technological standpoint?](#)

A: “Any piece of our technology stack has to be cloud-based. It has been for some time, but I think no matter what you’re using, it should be there. I can log in on a tablet or on a desktop. If my computer crashes, I could literally go and get one the next day, and be right up and going. So ProConnect Tax prevents us from losing efficiencies based on our hardware or our computers—and that is huge.”

Q: [What drove you to invest in cloud-based technology?](#)

A: “Honestly, I missed the first five years of my older kids’ lives. At that point, I said, ‘It’s them or me.’ I was driving home—it was probably 2 am—from our office, and I thought, ‘What the heck is going on? It’s a very lucrative job, but it’s not a job I want anymore.’ And I felt like this business is built based on me running it—not processes and not systems. So something has to change.”

Q: [How does ProConnect Tax fit into your membership model for advisory services?](#)

A: “We always say, let your best client pick your next client. What do my best clients want? They want tax advisory. You explain that the tax return is a compliance piece of the membership. There’s the advisory piece, and then there’s the access to your firm. You’ve got to set your own expectations of what access you’re going to allow to your clients, and you also need to lay out the scope.”

Conclusion

Intuit ProConnect Tax is cloud-based professional tax software that modernizes your firm. It streamlines workflows, eliminates manual data entry errors, and saves time by creating efficiencies. With ProConnect Tax taking care of tedious and repetitive tasks, accounting professionals are free to spend time interacting with clients, doing higher-level work, or clocking off earlier in the day. It's a boon for recruitment and talent retention by expanding hiring pools and creating flexibility for workers. With more efficiencies and enhanced client service, accounting professionals are already seeing higher revenue and increased income streams.

Whether your firm needs one user or one thousand, custom pricing options cover all firms with tax return bundles of every size. Call **844-534-2388** today to get started.

"Data from QuickBooks Online can be imported to ProConnect Tax. I can prepare business tax returns in ProConnect and import the K-1s to the individual tax returns. I can securely collect organizers and documents from clients using Intuit Link, which is built into ProConnect. I can request an eSignature with knowledge-based authentication with just a few clicks. Then, I can use that tax data to create a tax plan right from within ProConnect using Intuit Tax Advisor."

– **Al-Nesha Jones, ASE Group**

In G2's Winter 2024 Reports, ProConnect Tax won eleven different badges including number 1 out of 111 Corporate Tax Softwares. G2 is the world's largest and most trusted software marketplace. The badges include the following:



Please visit the [ProConnect Tax product page](#) for more information.

References

Data sources

¹ Asana, 2023 [Anatomy of Work Global Index](#).

² Qatalog and Cornell University's Ellis [Idea Lab, 2021 Workgeist Report](#).

³ Intuit, [2023 QuickBooks Accountant Technology Survey](#).

⁴ Ben Wigert, Jim Harter, and Sangeeta Agrawal, "[The Future of the Office Has Arrived: It's Hybrid.](#)" Gallup.

Intuit products

[Intuit ProConnect Tax](#)

[ProConnect Tax Integrations](#)

[Intuit Tax Advisor](#)

[Intuit Link](#)

[eSignature](#)

[Protection Plus](#)

[Pay-by-Refund](#)

[Tax Organizer](#)

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