



Tax & Accounting

Achieving excellence with a centralized tax workflow





Drew Sullivan
Tax Operations Lead
Clark Schaefer Hackett

Clark Schaefer Hackett Key Data:

- Established in 1938
- 10 locations, primarily in Ohio, Kentucky and Michigan
- A full service firm offering tax, audit & assurance, advisory and outsourcing services

Managing multiple disparate systems can be a significant challenge for any organization.

It often leads to inefficiencies, increased workload, and a lack of streamlined processes. Firms facing this challenge frequently look for solutions that can help them centralize their tax workflow and enhance overall efficiency.

Clark Schaefer Hackett, a prominent CPA firm, decided to tackle this challenge head-on. By centralizing their tax operations around CCH Access™ Tax, they transformed their workflow, allowing them to focus on staff skills and client service. Drew Sullivan, Tax Operations Lead at Clark Schaefer Hackett, shares how this powerful tool has become the cornerstone of their tax operations.

Why CCH Access Tax?

Sullivan emphasizes the central role of CCH Access Tax in their firm: “It’s the powerhouse. It’s what our company has just relied on for so long. We used the CCH® ProSystem fx® version for a while, and then we switched to the cloud-based CCH Access version. It’s always been that center focus for so much of our tax group. It’s what they live and breathe.”

The transition to the cloud-based CCH Access Tax has allowed the firm to leverage advanced features and maintain a robust tax compliance system. One notable enhancement is the K-1 import feature, which Sullivan believes will significantly improve efficiency. He explains, “One of the enhancements in Access Tax that my department is super interested in is the K-1 import. We’ve vetted third-party solutions, but Access Tax’s revamp of the K-1 import is exciting. For clients with large K-1s or multiple inputs, it could save a lot of time for our staff.”

Building a consultative skillset

Clark Schaefer Hackett is committed to evolving with technology to better serve their clients. Sullivan highlights the shift in roles within the firm: “We don’t want professionals spending so much time inputting numbers. We want them to be more consultative, talking with their clients more. To do that, you have to leverage technology. It’s a shift in how some roles for tax professionals will change with technology.”

This shift allows tax professionals to focus on higher-level tasks, enhancing their consultative skillset. “It’s becoming more of a first-level review where they’re using the technology available to them and changing their skill set from less number crunching to understanding the forms and where these numbers are coming from,” Sullivan adds.

Creating efficiencies with an integrated platform

Efficiency is a key focus for Clark Schaefer Hackett. The integration of the CCH Access platform has streamlined their workflow, reducing the need to juggle multiple programs. “We see efficiency where you’re not having to pull up ten different programs. It’s that starting point of [CCH Access] Workflow and then being able to click into it and get into [CCH Access] Document to get the work papers or go to [CCH Access] Client Collaboration,” says Sullivan.

The firm has moved away from using multiple products from different vendors. “Everyone in the tax world is looking for a streamlined tax process. We realized we needed more of a core process for our main everyday tax return stuff. That’s where we honed in on some of the CCH products to help streamline that tax process,” Sullivan explains.

Empowering future success with CCH Access Tax

Clark Schaefer Hackett’s adoption of the CCH Access platform has not only enhanced their efficiency but also allowed their professionals to focus on more consultative roles. With features like the K-1 import and a streamlined workflow, the firm is well-prepared for future success.

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