



Tax & Accounting

Allred Jackson's Journey to Efficiency and Innovation with CCH AxcessTM





Scott Jackson, CPA
Managing Shareholder
Allred Jackson

Allred Jackson Key Data:

- Established in 1981
- 30 employees
- 2 offices, located in North Logan and American Fork, Utah
- Full-service firm specializing in closely held businesses and their business owners

When Allred Jackson, a 30-person firm with two offices in Utah, set out to find efficient and comprehensive tax software, they had no idea they were about to embark on a transformative journey.

What began as a search for better tax compliance solutions led to the discovery of innovative, automated workflows that not only met their needs but also fueled their growth and efficiency in unexpected ways.

An early adopter of the CCH Axxess suite, the firm was drawn to its integrated workflows and comprehensive tax compliance capabilities. Scott Jackson, Managing Shareholder, recalls the early days of their journey with CCH Axxess. “We made the decision to come to CCH Axxess several years ago. At that time, they didn’t have all of the offerings that they have today, but the ones that they did offer, we just felt it would be an advantage. We were an early adopter, and have enjoyed the experience along the way.”

The firm was drawn to CCH Axxess primarily because of its integration capabilities. Jackson explains, “One of the primary reasons we chose CCH Axxess was because of their integration. That integration has made our efficiency as a team far greater than we were experiencing before.”

A cohesive solution

As CCH Axxess solutions become more ingrained in the firm’s workflows, they began to see transformative benefits. The suite of solutions brought together all their processes into one cohesive system, allowing them to adapt and provide top-notch service in a collaborative way. Jackson notes, “Our primary challenge that we were trying to solve by adopting the CCH Axxess suite was really a truly integrated set of software or solutions that fit the work process of our firm. Over the years, it’s just continued to enhance and evolve to the point where I don’t think we could operate without it.”

Comprehensive tax compliance

When it came to tax compliance, CCH Axxess Tax stood out among other software options. Jackson highlights its breadth of coverage among multiple states and its ability to handle both basic and complex returns. “We chose CCH Axxess Tax because of its breadth of coverage among the multiple states, and it was the one solution when we compared it to others, that really kind of checked a lot of boxes for us: the ability to handle some of our basic returns all the way up to our complex returns, multi-state and international filings for our clients.”

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Innovation, automation and growth

One of the biggest time-savers in Allred Jackson's tax workflow has been CCH Access Tax's integration with other solutions to help the firm automate their tax workflows, especially data entry. Jackson shares, "On the individual side, we use CCH® ProSystem fx® Scan on the front end, which has helped us have consistency in the organization of our work papers. We've also used AutoFlow to help with data entry and filling in gaps where we may have been short of staff."

On the business side, the firm leveraged Scan for document management and standardized workflows. The ability to import data from ProSystem fx® Engagement and Excel files further streamlined their processes.

Another innovative solution that made a significant impact was CCH Access iQ, which uses predictive intelligence to identify clients that might be affected by recent and pending legislative changes. Jackson explains, "We use CCH Access iQ to reach out and make conversation with clients about things that might be affecting them. It was not originally a revenue generation approach for us, it was more of a customer care approach, which has in turn generated revenue. But that wasn't our initial objective."

Jackson notes that CCH Access iQ's integration with the CCH Access Tax 1040 Return Dashboard has not only helped generate revenue, but also helped the firm save time. "CCH Access iQ has definitely saved us time," he says. "Especially when you can, right on the dashboard with CCH Access, identify the events or activities that really are applicable to the client based on the information that's contained in their return."

Top notch service in a collaborative environment

Allred Jackson's journey with CCH Access is a testament to the power of integrated workflows and innovative solutions. The firm's early adoption of the platform has paid off, enabling them to enhance efficiency, save time, and generate revenue. As Scott Jackson concludes, "It has really brought together all of our processes into one cohesive solution. We've been able to adapt the processes to provide what we consider to be top notch service in a very fun and collaborative way with our team."

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