



Tax & Accounting

Unlocking Efficiency and Driving Profitability in Business Tax Engagements



An Ultra-Competitive Industry Requires Ultra-Efficient Work Processes

For small accounting firms with 1-4 professionals, time and resources are precious. Meeting client demands for fast, accurate, and value-driven tax services often feels overwhelming, especially with evolving compliance requirements and increasing client expectations. To remain competitive, small firms must adopt tools that simplify processes and reduce burdens without requiring large teams or IT infrastructures.

CCH Axcess™ Engagement Essentials offers exactly that: a powerful, modern, cloud trial balance solution designed to streamline workflows, eliminate manual errors, and enhance client service. Firms that embrace simple yet effective solutions gain the efficiency and confidence to meet client needs while maintaining profitability.

“Manual errors and data entry issues were a constant headache. With digital workflows, those errors have virtually disappeared. This allows us to focus on delivering higher-value client services.”

Daniel Kaufman
Partner, Hertz Herson



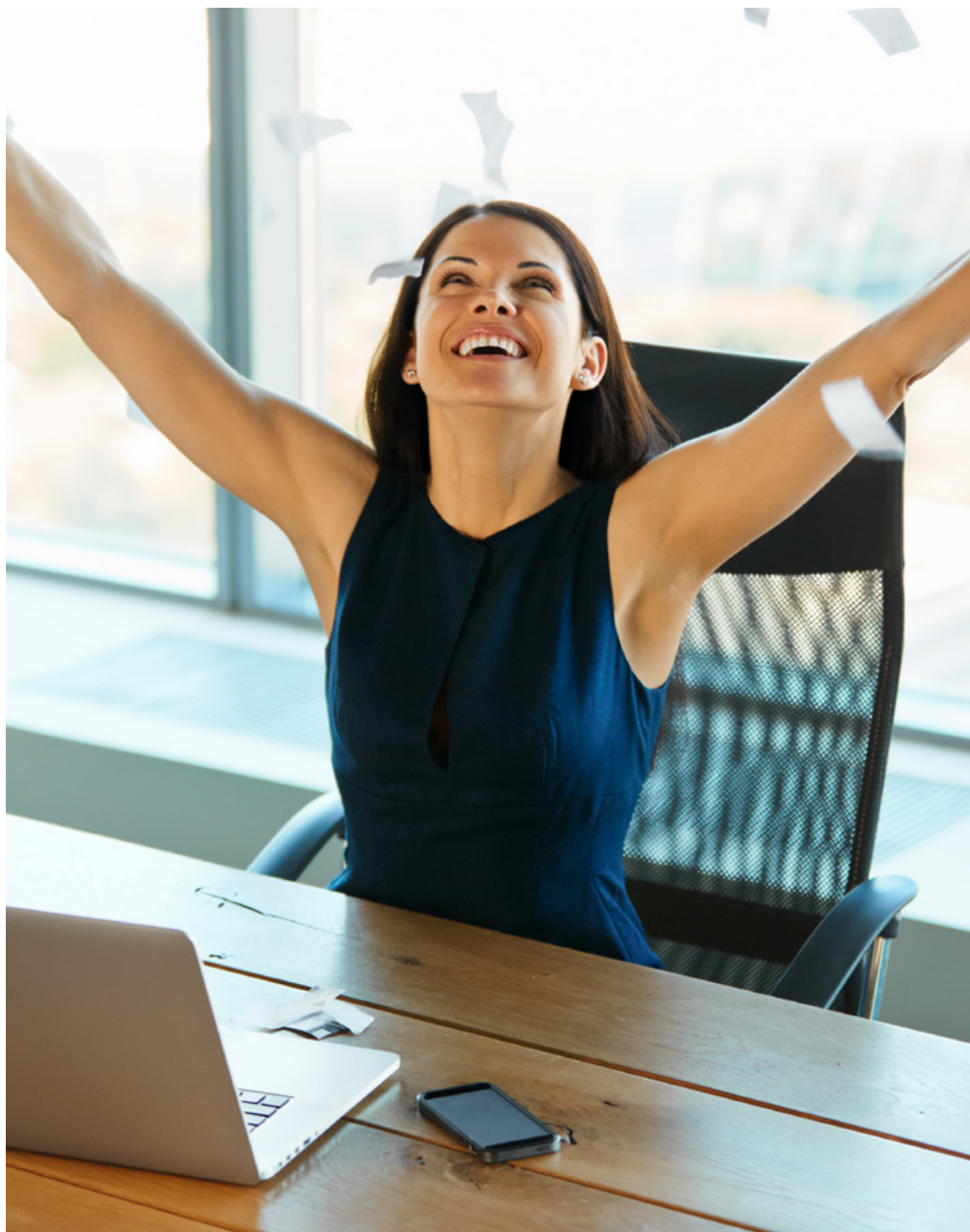
From Challenges to Opportunities: Embracing Change

Manual processes present significant hurdles for small firms, including error-prone data entry, inefficient collaboration, and staff burnout. These challenges can lead to missed opportunities and strained client relationships.

By leveraging technology tailored for small firms, you can transform these challenges into opportunities. Tools like Engagement Essentials automate repetitive tasks, reduce errors, and enable team members to dedicate their time to value-driven activities — enhancing both client satisfaction and employee morale.

“With CCH Axcess Engagement Essentials, we’ve streamlined processes to the point where we can complete returns in one-fifth the time. This efficiency allows us to focus on proactive client service.”

Jason Ackerman
Vice President, BNA CPAs & Advisors



The Digital Format: Efficiency Improvements through Freedom

Digital workflows, powered by tools like CCH Axcess Engagement Essentials, empower small firms to:

- **Automate Data Entry:** Save significant time by importing trial balances with one click.
- **Enhance Accuracy:** Reduce errors through automation and integration.
- **Streamline Collaboration:** Cloud-based access ensures seamless teamwork from anywhere.
- **Increase Capacity:** Handle more returns without needing additional staff.

“With Engagement Essentials, we’ve cut preparation time in half. This efficiency has allowed us to focus on analyzing financials and delivering better client outcomes.”

Elaine Marquez, CPA

Tax Department Team Lead, ADKF PLLC



Investing in Your Team and Tools

Advanced technology not only improves efficiency but also elevates staff satisfaction. Small teams benefit immensely from tools that simplify workflows and reduce low-value tasks. When your team is empowered by streamlined processes, they can deliver exceptional service — creating a cycle of client satisfaction and firm growth.

“This shift improves both client outcomes and employee morale. It allows your staff to focus on what truly matters, like helping clients achieve their goals.”

Daniel Kaufman
Partner, Hertz Herson



Power of the Platform: Integration That Works for You

CCH Axcess Engagement Essentials is part of the CCH Axcess™ Platform, delivering unparalleled integration for small firms. With features like direct integration to any CCH® Tax solution and seamless imports from QuickBooks® and Xero®, you can:

- **Save Time:** Eliminate manual uploads with one-click integrations.
- **Improve Accuracy:** Consistent data flow reduces errors and discrepancies.
- **Simplify IT:** Cloud-based access removes the need for server maintenance.

“Engagement Essentials software eliminates many steps for gathering data and preparing the tax return... With the dynamic link between Engagement Essentials and CCH Axcess Tax, any regular or tax journal entries that are added to Engagement Essentials are automatically updated in the return. Second year use of the product on the same customer should save 1 to 2 hours of preparation time.”

Bernie Ackerman, CPA
President, BNA CPAs & Advisors

A man and a woman are standing in an office, looking at a laptop. The man is on the left, wearing a grey button-down shirt, and the woman is on the right, wearing a light-colored sleeveless top. They are both smiling and appear to be engaged in a collaborative work task. The background shows a modern office environment with shelves and plants.

Success Stories: Real Firms, Real Results

ADKF PLLC



Challenge: Excessive time spent on tax return preparation.



Solution: Implemented CCH Axcess Engagement Essentials.



Result: Preparation time cut in half, enabling better financial analysis and client service.

Elaine Marquez shared, “The efficiencies we’ve gained have improved client service and work-life balance for our entire team. Engagement Essentials is a game-changer.”

[Watch Video →](#)



Success Stories: Real Firms, Real Results

BNA CPAs & Advisors



Challenge: Inefficiencies in importing and grouping trial balances.



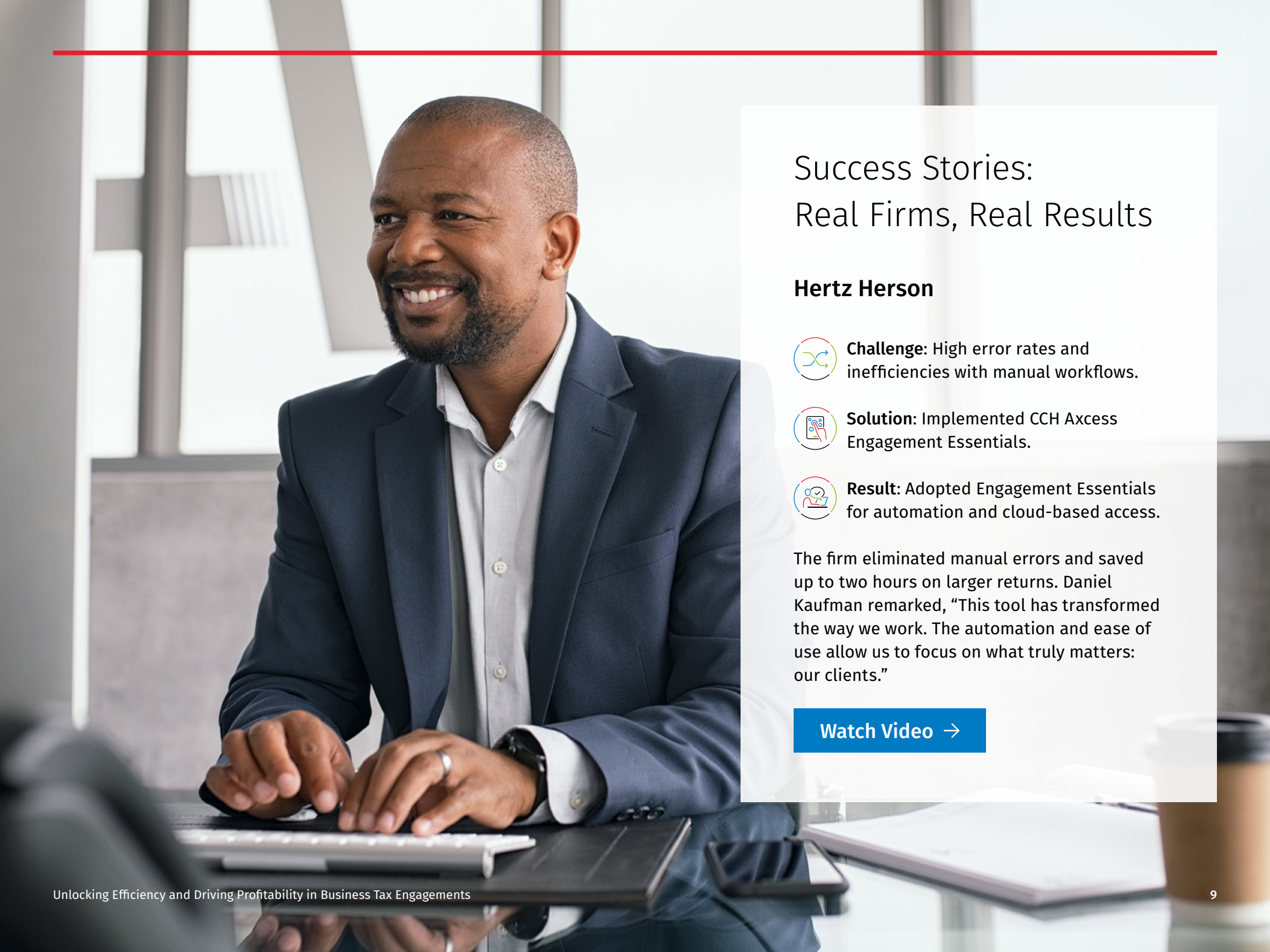
Solution: Utilized Engagement Essentials' seamless integration with QuickBooks® and Xero®.



Result: Preparation time cut in half, enabling better financial analysis and client service.

The firm saved over 30 minutes per tax return and improved staff productivity. Jason Ackerman explained, "With Engagement Essentials, we've streamlined our processes to complete returns in a fraction of the time, freeing up resources for higher-value tasks."

[Watch Video →](#)



Success Stories: Real Firms, Real Results

Hertz Herson



Challenge: High error rates and inefficiencies with manual workflows.



Solution: Implemented CCH Axcess Engagement Essentials.



Result: Adopted Engagement Essentials for automation and cloud-based access.

The firm eliminated manual errors and saved up to two hours on larger returns. Daniel Kaufman remarked, “This tool has transformed the way we work. The automation and ease of use allow us to focus on what truly matters: our clients.”

[Watch Video →](#)

Business Returns Simplified

With today's demands for accuracy and speed, small firms with 1-4 professionals are increasingly turning to technology to maximize efficiency. By leveraging solutions like CCH Axcess Engagement Essentials, small firms can save time, enhance accuracy, and focus on high-value client services instead of repetitive manual tasks.

Are you ready to simplify your business tax return preparation process?

Actions	Manual Workflow — Cons	Automated Workflow — Pros
Trial Balance Management	• Inability to access client financials remotely • Redundant management of client data in separate systems	• Simplifies trial balance and return syncing • Allows one-click trial balance entry across returns • Enables remote file access • Streamlines tax balance calculations • Eliminates redundant tasks, saving time
Workpaper Management	• Manual steps lead to errors • Data duplication across forms • Limited ability to collaborate across locations • Lack of visibility into engagement status	• Reduces data handling errors • Integrates data seamlessly for use across forms • Enables real-time collaboration from anywhere • Centralized status monitoring ensures transparency



The Digital Scale Has Tipped — What Are You Waiting For?

The time to embrace digital transformation is now. By investing in tools like CCH Axcess Engagement Essentials, your firm can:

- Increase profitability through efficiency gains.
- Enhance client satisfaction with faster, more accurate service.
- Empower your staff with meaningful, value-driven work.

Take the first step towards transforming your business tax engagements today.

Start Saving Time Today →

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Visit EngageTax.WoltersKluwer.com/EngagementSolutions4CPAs for more information.

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