

# A PLEASANT PLACE TO WORK

How Thomson Reuters Onvio makes the firm Wanda G. Conway, CPA an even nicer place to spend the work day.

## MEET THE FIRM

The work life of an accountant is never easy, but it can certainly be made more agreeable with the right tools to do the job.

In the case of Wanda Conway of Fayetteville, Arkansas, the search for the right tools led her firm, **Wanda G. Conway, CPA**, to Thomson Reuters Onvio. Wanda was already familiar with Thomson Reuters since the firm uses other CS Professional Suite® products and they work well for her business model.

“We started using Thomson Reuters products in 2012,” she says. “We started out with UltraTax CS and gradually moved away from the other software we were using. One thing I really like is that [the Thomson Reuters products] integrate with each other. And in the grand scheme of managing the practice, there’s less time involved with any one client because I can have that integration. We increased our use of Thomson Reuters products at a manageable speed by adding Accounting CS, then a practice management tool [Practice CS], then Fixed Assets CS.”

Right around the time Conway decided to give her client online access, she got the chance to become involved with Onvio — which includes the online access in Onvio Client Center — as part of an early adoption program. But she admits now she wasn’t completely sold on the idea at first.

“I had as much workload as I could possibly handle, and then a bit,” she says. “The thought of trying to implement a new product was kind of overwhelming.”

Luckily, she had good backup. “The Thomson Reuters team I worked with was just over and beyond helpful. All I had to do was call and say, ‘I can’t get this to work. My screen doesn’t look like I think it should.’ And it was fixed. This was at Christmas time last year, but they still made time to get it working for me. I appreciate that so much.”

“I think any firm who wants to be more productive, increase their client base or decrease their number of hours at work with their existing client base would benefit from Onvio. Even in the first year it made my firm efficient — enough that I could take additional time off work. And I expect that time to grow as I use more and more of Onvio’s features.”

— Wanda Conway



## FIRM

**Wanda G. Conway, CPA**

Wanda G. Conway, Owner/CEO

## ABOUT

Wanda G. Conway, CPA is located in Fayetteville, AR. The firm offers a full range of services for small businesses, including tax planning and preparation, IRS resolution advisory, business accounting, new business counseling, payroll services, estate and trust planning and cash flow and budgeting analysis.

## WEBSITE

You can learn more about the firm at their website, [wandaconway.com](http://wandaconway.com).

## THOMSON REUTERS SOFTWARE

Onvio™ Client Center  
Onvio Documents  
SaaS (Software as a Service)  
UltraTax CS®  
Accounting CS®  
Practice CS®  
Fixed Assets CS®





How did Conway's clients take to the change in procedure? "They ran the gamut," she says. "Some of my older individual tax clients barely use an iPhone®, whereas most of my businesses use tablets and, of course, computers and mobile phones. I had a couple of older clients who didn't want anything to do with it. They wanted to bring me a stack of papers. That's fine; they've been clients for a long time and I have to meet all their needs, so I'll deal with their stack of papers. But the majority of my clients were very excited that they didn't have to come pick up their tax returns. They could just get it online."

"I had a few clients who really embraced it. They sent me their documents via Onvio and also retrieved their documents and their tax returns that way. They've also gone further and communicated with me via Onvio throughout the year."

Conway knows she has a little more client training to do. "The first year was us all getting our feet wet and getting the product out there, saying, 'Hey, this is a great product. Help me use it.' I think we'll see more people using it this year."

When asked if her clients drive the level of technology the firm uses, Conway has a ready and well-thought-out answer.

"My clients' demands for technology haven't affected the way I do business as much as the way I do business has affected their need for technology. For the most part, I feel like I've been the driver in saying, 'We really need to go to this system.' Or, 'This will vastly improve your service.' There are a few people who are reluctant to do that, but once they do, the vast majority have been very happy that I've pushed them a little bit."

What's the single most important difference Onvio has made to her firm?

"Productivity. I see a marked difference between productivity with and without Onvio. In my particular situation, moving to Onvio hasn't increased my firm's revenue overall — but then, my goal isn't to increase my client base, but to spend less time at work. If I look at each individual client, it's increased the revenue for the amount of time I spent on that client, but I'm spending less time at work. So my revenue is pretty much the same, but I'm spending more time doing what I like to do."

"Onvio has made my work life more pleasant. It's eliminated the menial tasks and has made office life much more pleasant and productive — not just for me, but for my staff, too. It's a pleasant place to spend your work day."



"One benefit I was not expecting Onvio to give me is the ability for my clients to help themselves, rather than me having to be an intermediary and get the information they need throughout the year."

— Wanda Conway

To learn more about Thomson Reuters Onvio, visit [tax.tr.com/onvio](https://tax.tr.com/onvio)

