

THE SECRET TO HER SUCCESS: THOMSON REUTERS SOFTWARE

PARTNER SUMMITS

Small firm uses technology to reap big benefits.

Dawn Sabo, president of **Sabo Accounting & Tax Services** in Houston, Texas, was looking for a technology solution that would integrate all of her tax and accounting software. But she wanted more than just tax software. She also wanted practice management tools, which she'd been searching for but had yet to find.

Sabo discovered Thomson Reuters in the fall of 2012, and quickly learned that they could deliver everything she wanted—and more.

She jumped right in with Software as a Service (SaaS), working with her Thomson Reuters sales representative to get up to speed in no time. And she's never looked back.

By the end of the April 2013 tax season rush, Sabo's firm had seen measurable results, especially compared to a similar firm nearby with a bigger staff, but no integrated software solution.

"Even before the year was over, I'd taken on 15 percent more new work without adding any staff," she says. "I realized that Thomson Reuters is much more than a software provider. They're truly a business partner."

The secret to Sabo's success? The suite of Thomson Reuters products she's using through SaaS.

"As a small practitioner, I was looking for a product I could use anywhere, any time," she explains. "I also have staff that isn't based in Houston, so I needed the ability for everyone to access all our products and client files."

A SMART INVESTMENT

Although the monthly fee for SaaS seemed steep at first, Sabo says it paid for itself in just two months.

She estimates the software saves about four full days a month of administrative staff time—not to mention her own time that could be better spent. Instead of manually going through time sheets and creating, printing, and reviewing invoices, it's all done automatically through Practice CS and NetClient CS Portals.

"I switched to Thomson Reuters software because it had the functionality and integration I needed," Sabo explains. "I couldn't live without it now."

She also appreciates being able to see staff utilization and monitor how well everyone is using the integrated system, to make sure they're maximizing efficiency.

"When I looked at the cost of the hours we were spending compared to the cost of the software, it's very similar if you take out the client portals, which I never had before," Sabo says. "That's when I really saw the value."

It didn't take long for her clients to get used to using the client portals, which deliver better service and even more efficiency.

"They're able to get the information they need much more quickly," Sabo says. "And it's all branded to your firm—not Thomson Reuters—so your clients think you're a superhero."



SABO ACCOUNTING & TAX SERVICES

Dawn Sabo

FIRM FACTS

BASICS—

Based in the Houston area, Sabo Accounting & Tax Services operates with a staff of about five. They primarily serve small- to medium-sized businesses with both accounting and tax services.

SOFTWARE—

The firm uses Thomson Reuters software tools including FileCabinet CS[®], UltraTax CS[®], Practice CS[®], Accounting CS[™], and NetClient CS[®] portals, all through Software as a Service (SaaS).



THOMSON REUTERS™

PARTNER SUMMITS

REACHING THE SUMMIT

For Dawn Sabo, attending a Partner Summit was an excellent way to envision the future of her career.

"I was looking for a way to make some changes in my practice," she explains. "I wanted an opportunity to speak with other small- to mid-sized practitioners about how they've made changes to better serve their clients without adding a bunch of staff."

Sabo found that—and more. She says the presenters exceeded her expectations, and the chance to speak with Thomson Reuters subject matter experts and other users about best practices was equally educational.

"The Partner Summit helped me see that Thomson Reuters is much more than a software provider," Sabo explains. "They're really in it with you for the long haul to support every aspect of your business."

THE SKY'S THE LIMIT

Ultimately, the integration of all of Thomson Reuters' products is key, Sabo says. It allows her to access all of her client records and files from one point of entry—the Practice CS module—and keep track of every detail of her firm's interaction with each client.

Being able to use Practice CS to see where things stand with a client, which staff member has completed a task, and when it's time to move on to the next step with a client is invaluable, she says. Best of all, every product in the suite works together seamlessly—no matter where she is.

"SaaS has allowed me to be more efficient and effective, and better meet my clients' needs while I'm away from the office, which is almost daily," says Sabo. "The sky's the limit with Thomson Reuters, and we couldn't do it without them."

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