

Solve your biggest challenges: Automate your workflow

Automation is vital for any firm looking to improve efficiency and promote connectivity between staff and clients. How can you use automation to optimize operations and keep your firm moving forward?

Create opportunities to generate more revenue

70% of businesses that added automation to their accounting process reported a strong ROI¹

45% of accountants plan to automate tasks that are both repetitive and time-consuming²

Recruit and retain top talent

1/3 of firms said that their top priority is finding and developing quality talent³

56% of accountants reported that accounting technology has made them more productive²



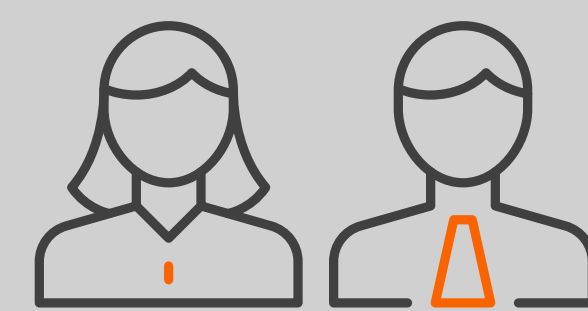
How does automation help firms?

- Improve productivity by eliminating tedious tasks
- Reduce turnover and burnout with more fulfilling work
- Boost revenue with increased focus on strategic initiatives
- Eliminate human error and deliver more accurate audits and tax preparation

How does automation help employees?

- Flexible, remote work opportunities
- Ability to work across multiple devices and stay connected anywhere
- Faster, simpler, and more efficient research capabilities
- Intuitive and helpful tools for monotonous tasks

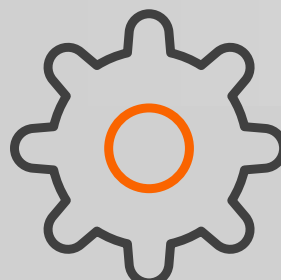
Increase connection between staff and clients



Clients expect simple, easy-to-use online engagement and easily lose patience with inefficiencies

82% of accountants expressed that their clients expect more today than ever before²

Automation helps you meet those needs

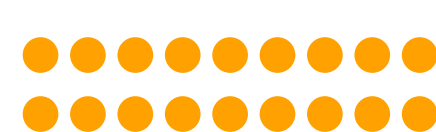


35% of accountants saw increased retention rates and client satisfaction with upgraded accounting technology²

Stay current with tax law changes

51% of firms said keeping up with regulatory change is a perpetual headache and one of the biggest issues of 2022⁴

Adding a research platform to your automation tech stack lets you quickly check for regulatory changes from multiple trusted sources — all in one place.



Experience unrivaled productivity and efficiency with automation. Power your firm forward with expert tax and accounting technology today.

Automate processes with connected tools and solve your biggest tax challenges

Get started