



RANDY
BRIDGES
CONSULTING

Employing Cloud Technology to Support Tax Professionals

Organization Description

Client: American Tax Professionals (ATP)

Industry: Taxes and Finance

Description: Since 1981, the American Tax Professionals team has assisted taxpayers beyond the forms, looking instead to financial position (the bottom line) and helping clients achieve their business goals.

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Business Challenges

One of the biggest challenges that ATP faced was getting access to the client's financial information so that accurate projections, records and timely tax filings could occur. In addition, they were concerned with business owners who might face audits involving strong-arm tactics by government agencies, often leading to fines and levies to their business.

To combat both of these issues, Owner Paul Kent, a certified tax court practitioner, created a signature service: the "Executive Service Club" (or ESC). This service would allow his team to have immediate and shared access to each client's financial information, while each client could see only their own information. This shared view allowed his team to provide more effective accounting, tax advice, audits and intervention services on a regular or as-needed basis.

Previous Solution

A first-round solution included a terminal server environment that would support the ESC system. The estimated 4-year support investment was \$114,000, plus \$30,000 in hardware and operating system costs. Some issues included:

- Expensive to maintain compared with the generated revenue
- Significant upfront expense in security upgrades, hardware, and software
- Lack of redundant Internet connections
- Regular investments to sustain growth - additional resources were required before they could be consumed.

Proposed Solution

In place of the terminal environment, the RBC team suggested deploying a cloud-based environment.

This solution would be hosted in RBC's data center and run on the industry-leading Citrix XenApp platform. The environment is built on enterprise-grade solutions, provides strong data security of the data center; redundant networks, systems, power and connectivity; automated backup and disaster recovery; and 24x7 access from anywhere in the world.

RBC integrated QuickBooks, Lacerte Tax and Microsoft licensing services and technical support for the ATP business team. In short, ATP would eliminate the expensive internal system, could work from home or the office, and all team support would be provided.

Once the ATP access was complete, RBC then extended the solution to ATP's clientele, providing a complete and secure solution for both ATP and the Executive Service Club.

Results

This solution provided highly accurate returns and security improvements for the client.

- Regular support investment was reduced by **38 percent**, month over month
- **No upfront expenses** for the hardware or operating systems
- Anytime growth or shrinkage on a sliding investment schedule equal to ESC member count
- Deployment timeframe was reduced by **64 percent** from previous deployments of a similar sized company.
- No client time required during implementation or 'Go Live'
- Existing equipment could be sold to offset tax liabilities