



# Taking the taxing out of taxes

Albert Einstein is credited with saying that the hardest thing in the world to understand is the income tax. It's no wonder that tax preparation firms are so highly valued by their clients, and why one firm chose OfficeSuite UC<sup>®</sup> to ensure that its nearly 80-year reputation for customer service excellence remained a non-depreciable asset.

## Industry

Income tax preparation

## Customer

New York State business

10 permanent employees; 100s during tax season

2 year-round locations; 20+ during tax season, several offices by appointment post tax season

Individual, corporate, not-for-profit

## Challenges

Ability to scale for seasonal fluctuations

Unreliable phone service for customers

Standalone offices vs. integrated system

Lack of 4-digit dialing between locations

Managing local and long distance calling plans for each location

Managing call routing during off season and in emergencies

## Solutions

OfficeSuite UC<sup>®</sup>

Circuits for added redundancy

## Results

Increased flexibility/scalability

Increased productivity

Ensures customer calls are answered

Calls properly routed in any situation

## Jeopardy assessment

It's not unusual for businesses in certain industries to experience cyclical periods of higher volume at one time versus another. Few, however, come anywhere close to the extreme peak and valley of firms that prepare income tax returns. For the firm, 99% of their annual business is conducted in the four months from January to April. "Being down for a day is equivalent to another business being down for a week. If we can't provide the right service, the customers will go to our competitors next door. We must ensure that customers can connect with the business at all times," explained the firm's general manager. During this peak, the company operates 20+ offices, though the majority close for the remaining 8 months of the year. When the next tax season rolls around, it's time to bring back the seasonal staff of nearly 200 tax preparers/office staff and reopen the rest of their locations.

While the staff is seasonal, maintaining the technology at all locations is a year-round responsibility for the general manager (GM) and his IT manager. Between them, they manage about 150+ desktops, several servers in remote locations and a full data center at the company headquarters which includes file, FTP and SQL servers, routers, firewalls and security systems. It is also their responsibility to activate/deactivate vital services at the other 20+ locations according to the tax season schedule.

This process was made particularly challenging by the complex and unreliable phone system they were using. Each office had its own incoming call routing to call groups, plus each workstation was equipped with a main line, second line and fax line. With their existing premises-based phone system, any change—additions, rollovers, moves—necessitated a call to their telephone provider. When the office closed after the season, someone would have to physically go to the office and un-forward/forward the phones to the headquarters location. If someone forgot, it was a mess to correct, and resulted in missed calls and lost customers. This consumed a tremendous amount of management time and was very costly to maintain.

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## Technology know-how

The general manager and his team were determined to achieve much greater efficiency, productivity and improved service levels that would be hard to achieve with each office acting as a standalone location vs. integrated with all the other offices.

“Technology is what drives our industry; it’s what helps us retain and bring in new clients. Having an edge that other firms don’t have is what saves the client.”

Key to achieving those goals was to ensure that the tax preparers could remain focused on their job: prepare taxes and bill clients fast and accurately. To do that, he needed a provider with the technology that would accomplish several goals:

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Connect all the offices that were functioning as mini-standalone networks to a central operating system so that the preparers could access their client’s full tax histories, generate receipts and track their commissions;

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Ensure that customers would be able to reach them at all times by eliminating busy signals, implement direct, four-digit dialing throughout the system for greater efficiency; and be able to manage the phone system from any location;

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Enhance the network with cable/fiber in the offices for greater reliability and to utilize IP based phones.

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With the current phone and data networks seriously underperforming, the GM contacted his trusted Windstream Enterprise representative.

## Optimizing asset performance

Once the GM was introduced to Windstream Enterprise’s OfficeSuite UC®, he was sold on the tremendous functionality and ease of operation it provides. He was especially impressed with OfficeSuite UC’s portal that gives him full visibility into how well the network is operating and where problems or even office outages (during a snowstorm, for example) are occurring. The portal enables him to forward the remote offices’ call groups to the company’s headquarters from any location so that no client call goes unanswered. From a customer service perspective, OfficeSuite UC offers superior auto attendant options making it easier for clients to get to the right person faster. The firm has even been able to use professionally produced scripts for their offices and can easily record, activate, update or change their scripted messages via the portal.

The firm also replaced some DSL lines with Windstream Enterprise circuits to connect each office with a Barracuda firewall linked via high-speed VPN to their headquarters. The network supports point-of-sale software that acts as a CRM and helps each office perform its own calling campaigns, as well as containing all client data that can be accessed from any location to enable management to monitor performance, see real-time statistics and create instantaneous reports. It also enabled them to use IP phones for direct, four-digit dialing and faster access within and across office locations. As an added benefit, they have seen a reduction in their phone bills at all sites.

Taxes may be a certainty, but the process going forward will be a lot less taxing thanks to OfficeSuite UC. Increased network speeds that provide location-wide integration and redundancy, greater telecommunications visibility through the portal, ease of operation, and flexibility to scale for the seasonal nature of the business, will ensure that the firm continues to receive lots of returns—tax and customers.

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### About Windstream Enterprise

Windstream Enterprise collaborates with businesses across the U.S. to drive digital transformation by delivering solutions that solve today’s most complex networking and communication challenges.

To learn more about Windstream Enterprise, visit [windstreamenterprise.com](http://windstreamenterprise.com)

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