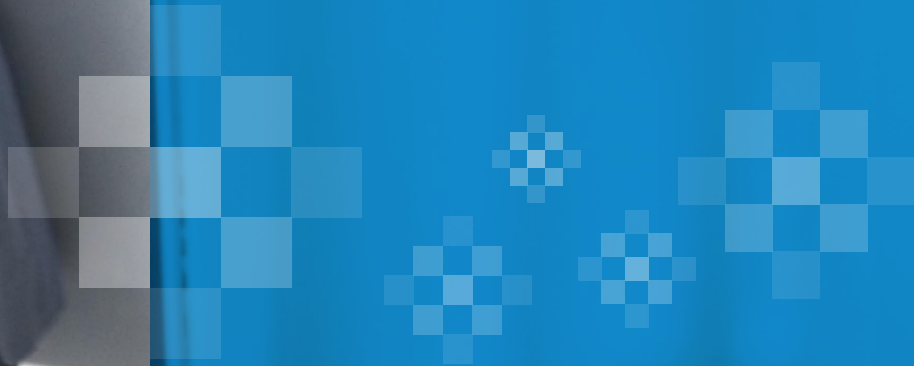




This four-person tax practice continually increases its productivity and improves its bottom line — year after year — without adding personnel. What's this firm's secret?

CCH software tools can help any size tax and accounting firm become more efficient, more productive and more profitable.





Jackson Coles is a small firm with two CPA partners and just two other full-time staff members: a staff accountant and an office administrator.

Despite its size, this firm has a thriving tax practice, while also performing accounting duties for local clients in Boise, Idaho. The majority of the firm's work is for high-income individuals, plus a mix of corporate business and smaller businesses that include Partnerships, S Corporation and Limited Liability companies.

The Jackson Coles firm is active in the Boise Metro Chamber of Commerce, and, in fact, both partners are graduates of the organization's Leadership Program. Both Rich Jackson and Jason Coles are accredited as a Personal Financial Specialist, credentials they earned at the American Institute of Certified Public Accountants. With nearly 40 years of experience in public accounting, Rich Jackson has authored a course for the American Institute of Banking and also serves on the Tax Policy Board for the Associated Taxpayers of Idaho.

When Jackson Coles describe their operation, they have a pretty straightforward maxim: "We're the tax guys who can save you money."

Achieving efficiency with minimal staff

Rich Jackson and his partner Jason Coles are more than just satisfied users of CCH solutions; they could almost be viewed as evangelists. Moreover, their tax firm might easily be considered a fully functioning CCH operation.

Currently, Jackson Coles and its small but highly productive staff are running smoothly with no less than nine different CCH software programs.

Rich Jackson likes to quietly boast that his most recent staff hire came from a fair-sized regional firm in California who estimated that Jackson Coles was two to three years ahead of her old firm on the technology curve.

"CCH has made us far more efficient with less staff — and that drops money straight to the bottom line."

— Rich Jackson,
Partner
Jackson Coles, PLLC

Achieve instant credibility with a professional website

According to Rich Jackson, the very first CCH solution any small tax firm should adopt is ProSystem *fx*® Site Builder. In his firm's early days, the website was not a top priority — in fact, it often languished in development for months, like many other small firms.

ProSystem *fx* Site Builder immediately helped to enhance the image of Jackson Coles as a genuine tax authority by giving the firm a professional-looking presence on the Internet.

The Jackson Coles website now provides its customers and prospects with up-to-date information and useful financial tools. The firm only receives positive feedback on the website from its clients.

Personally, Rich Jackson feels building a customized website for the firm was the smartest thing the firm has ever done, and he can't wait to expand the website.

“All it took was about four phone calls, a little development time and bang! Our website was up and running.”

— Rich Jackson
Partner
Jackson Coles, PLLC

CCH products work together to help you work better

The work process at Jackson Coles is like an ever-evolving work-in-progress for the innovative software solutions from CCH.

The firm first employed ProSystem *fx*® Practice Management to help with billing, time entry and project-tracking tasks. Then it was easy to leverage the harmonious relationship of ProSystem *fx*® Tax and ProSystem *fx*® Scan. These days, Rich Jackson is excited about CCH's addition of the new AutoFlow Technology™ to ProSystem *fx* Scan. Satisfied with one CCH solution after another over the years, he will use this new technology to:

- Extract data from the most common source documents used to prepare 1040 returns.
- Facilitate verification of the extracted information.
- Allow for real-time import of verified 1040 information, directly into ProSystem *fx* Tax.

In the early days of the firm, Rich Jackson became an instant fan of ProSystem *fx* Scan when he discovered he suddenly had tax files for all his clients that were far superior to his old disorganized mess of paper files.

Now with the addition of AutoFlow Technology, ProSystem *fx* Scan will become even more valuable, primarily because it has become very difficult to find competent, highly skilled staff.

At every industry conference he attends, Jackson discovers other firms lamenting the same kind of skilled-labor issues. In the future, however, Rich Jackson believes AutoFlow Technology will enable semi-skilled personnel to do much of the laborious tax return work, while the firm continues to deliver highly accurate information.

“Compatibility – how all the software interacts – that's the key feature that CCH builds in. I don't think you can beat it.”

— Rich Jackson
Partner
Jackson Coles, PLLC

Achieving a digital office

Never worrying about losing a document is just the first thing Rich Jackson mentions when asked about the importance of ProSystem *fx*® Document to his firm. After installing ProSystem *fx* Document software, the firm was able to significantly reduce office staff and get rid of all off-site storage.

Four years later, business is significantly up at Jackson Coles, and yet they still haven't needed to add a single foot of office space. Rich Jackson really appreciates that he no longer pays for storing paper documents thanks to the firm's digital back-up of all the firm's client files.

This freedom from dependence on physical pieces of paper also lets Jackson Coles enjoy peace of mind knowing its client files are safe from the dangers of fire or water damage.

In tandem with other CCH software, ProSystem *fx* Document put Jackson Coles into a truly digital environment where more than just its audit and tax returns are in electronic format. From client correspondence to employee records to email, ProSystem *fx* Document streamlines the workflow and manages the full range of content at Jackson Coles.

Best of all, it gives staff members 24/7 access to client files from remote locations, whether it be from home, a hotel room or a laptop overlooking Rick Jackson's camping spot.

“There's no big file room here. Our files are electronic, portable and backed up. We couldn't lose a file if we tried.”

— Rich Jackson
Partner
Jackson Coles, PLLC

Automate your compliance

In addition to increased efficiencies and cost savings, ProSystem fx Document also provides the risk mitigation every tax firm, big or small, needs for document storage and retention.

Sarbanes-Oxley, the Federal Rules of Civil Procedures and other regulatory compliance rules have changed the way tax and accounting firms in America can do business. ProSystem fx Document helps small firms like Jackson Coles meet these new standards, all in the background of their day-to-day work. Ask Rich Jackson about the automated retention feature of ProSystem fx Document, and then watch him break into a big grin as he draws, "I just love it."

By having the latest version of ProSystem fx Document, Jackson Coles also enjoys the Extended Storage feature that redefines content management with never-before-seen functionality as it literally expands its document management system into a content management system.

Now, Rich Jackson and his staff can manage applications like ProSystem fx[®] Fixed Assets, Microsoft[®] Excel or QuickBooks, live inside a document — without the worry of broken links.

"ProSystem fx Document has made life here at the office downright simple as we went forward."

— Rich Jackson
Partner
Jackson Coles, PLLC

Simplified email management

Rich Jackson and his staff are regular attendees at the annual CCH User Conference. In their estimation, they have formed some invaluable alliances, not only with CCH staff, but with other tax practitioners as well.

At their most recent conference, Rich Jackson and Jason Coles attended a session on how to best use ProSystem fx Document to better manage the firm's volume of email. As a result, Jackson Coles is now able to use ProSystem fx Document features to do the following:

- Drag and drop emails directly to their client list in Microsoft[®] Outlook, and filter their client list to work more efficiently.
- Access ProSystem fx Document functionality within Microsoft[®] Outlook and send emails with file attachments of content stored in ProSystem fx Document.
- Enhance collaboration within the firm by making selected client emails accessible to everyone.
- Comply better than ever before with regulations related to email retention and destruction.
- Manage the size of exchange servers by storing emails in a safe location that enhances workflow.
- Eliminate risks related to hard-drive crashes or laptop thefts by storing emails outside of archived email storage.

The future is now with CCH products

Rich Jackson likes to describe his Boise tax firm as "the little guys with a whole lot of ambition."

The firm decided long ago that in order to succeed despite its diminutive size, cutting-edge technology was the one and only way to go. Jackson Coles elected to become as "high tech" as possible throughout the practice. And that's the philosophy that began the relationship with CCH and, over the years, the adoption of one innovative software solution after another.

"CCH technology enables us to provide services to our clients that are second to none."

— Rich Jackson
Partner
Jackson Coles, PLLC

Rich Jackson brags that CCH is the biggest vendor on the payroll at Jackson Coles. But he's also quick to tell you that they feel the firm has gotten its money worth and more.

The proof behind this statement is simple: Jackson Coles still has only four people on staff, yet its business is growing year in, year out.

And, "that's productivity, Jackson Coles' style."

To learn more about ProSystem fx Suite, call 1-800-PFX-9998 (1-800-739-9998) or visit CCHGroup.com.

The most up-to-date product information, including detailed system requirements, enhancements, and new features, is available at CCHGroup.com. If you plan to use multiple ProSystem fx Suite products within the same system, call 1-800-PFX-9998 (1-800-739-9998) and ask to speak to your sales representative about whether or not your system availability is adequate.

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