CASE STUDY | HONKAMP, P.C.

SafeSend ONE

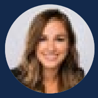
From Paper Chaos to Digital Success: How One Firm Transformed Its Entire Tax Process

Honkamp, P.C. is a Top 100 CPA and business consulting firm, serving client organizations in all 50 states and thousands of U.S. cities. Their clients include privately-held organizations, Fortune 500 multi-nationals, franchisor organizations across all industry sectors, government agencies, individuals, and nonprofit organizations.

Let us tell you a story.

It's 2015, and Tiffany Roussel, Honkamp, P.C.'s Tax Administrative Supervisor, is drowning in the same paper-heavy processes that plague most of the accounting profession. Tax returns assembled by hand, endless trips to the mailroom and the copier, chasing down signed 8879s...sound familiar?

But one day, while Roussel attended an industry conference, she stumbled upon SafeSend One and its tax returns feature. She was immediately drawn to the electronic delivery of tax returns and liked that returns could be visualized on the screen.



"We saw value in that right off the bat."
Tiffany Roussel
Tax Administrative Supervisor, Honkamp, P.C.

What started as curiosity about electronic delivery quickly became a complete transformation of how Honkamp operates during busy season. And it wasn't just about going paperless. They were about to discover how digital-first thinking would revolutionize their entire client experience while improving their bottom line.

The "Aha" Moment That Changed Everything

Initially, Honkamp was drawn to SafeSend One Tax Returns for the obvious benefits: electronic delivery and visual return assembly. But as they dug deeper, they realized they'd found something much bigger.

"As we started looking into it, getting the 8879s was even more intriguing," Roussel explains. "Then we discovered SafeSend Tax Returns could also be used for the distribution of K-1s to partners and shareholders. We have a lot of returns with multiple shareholders, and we know clients would find that valuable."

Rather than jumping in blindly, of course, Roussel did what any good accountant would do—she ran the numbers. And what she found was mindblowing.

The Numbers Don't Lie: A Major Financial Transformation

To convince firm leadership, Roussel presented a comprehensive analysis that went far beyond simple paper vs. digital comparisons. She calculated both the tangible and intangible benefits, including:

- The cost of paper and postage for printed tax returns
- Binders, tabs, and other supplies for client copies
- Postage-paid return envelopes for Form 8879 and estimated payments
- Time spent assembling returns, partner review, and chasing down 8879s
- Time spent sending estimated payment vouchers throughout the year

THE RESULT?
Honkamp, P.C. estimated they were spending roughly **$45 per tax return** for paper delivery. It was clear: The ROI made SafeSend One a no-brainer.

Smart Implementation: Testing Before Scaling

Honkamp started with a pilot group of 150 employee tax returns—a strategic choice that let them work out any issues before involving clients. The approach was brilliant: Who better to test the system than the people who would eventually be using it daily? Testing SafeSend One Tax Returns on this pilot group allowed Honkamp to work out any kinks on employee returns before using the product with clients.

The pilot went so well that Honkamp uses SafeSend One on roughly **62% of their tax returns**, with plans to increase that percentage significantly.

The Results Speak for Themselves

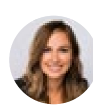
Roussel has a passion for tracking data, and the metrics tell an incredible story:

- Average turnaround time from delivery to signed: **2.67 days with SafeSend One**
- Average turnaround time for paper returns: **6 days**
- E-filing turnaround: **Within one day of signature**

"It's fair to say that SafeSend One cuts turnaround time in half from the date delivered to the date filed," Roussel says. "Gut feelings and opinions are one thing, but the data is inarguable."

Beyond Efficiency: Becoming an Innovation Leader

The tax return process transformation wasn't just operational—it was cultural. Honkamp, P.C. positioned itself as a forward-thinking firm that embraces technology to better serve clients, even though there's a little internal fear of requiring tax returns across the board. "Most people nowadays get everything electronically," Roussel explains.



"The clients who struggle with adoption are struggling everywhere."
Tiffany Roussel
Tax Administrative Supervisor, Honkamp, P.C.

But that hasn't stopped the great feedback Honkamp has received from clients who are using SafeSend One.

"We have clients from all over the U.S. and abroad," Roussel says, "so it's nice to be able to get them a quick copy of their tax return and collect their signature. When we can turn work around and get things out the door quicker, that improves client satisfaction. We're not only getting the return right but giving them options and showing that we're innovative."

Not Just Software—It's a Partnership

One aspect Honkamp particularly values is SafeSend's responsiveness to feedback. As an early adopter, they've helped shape the platform's development. Over the past near-decade, Honkamp has provided feedback on functionality and seen many of those suggestions implemented.

"Our experience with SafeSend One is that it's always a changing and growing product," Roussel says. "As requirements change, they're changing along with them, taking feedback and responding to it. Their customer support has been quick—we don't always get support like that from other vendors."

The ROI Breakdown: Where Honkamp Saves Big

How much time and money is your firm losing each year sending paper returns?

Honkamp, P.C. performed an in-depth ROI calculation to quantify the amount the firm saves by using SafeSend One. Here's a look at their numbers.

Description	Price Per Return	Total for 1,500 Returns
Binding	$2.42	$3,630.00
Tabs (Federal, State, Estimates)	$1.25	$1,875.00
Fasteners	$0.27	$405.00
Tax Records Envelope	$0.30	$450.00
Tyvek Envelope	$0.30	$450.00
Paper, Toner & Printing	$0.02	$30.00
Postage	$7.00	$10,500.00
Mailing Labels	$0.03	$45.00
Sign Here Stickers	$0.40	$600.00
Return Envelopes (Postage Paid)	$0.10	$150.00
Printing/Collation/Assembly	$3.33	$4,995.00
Mail Room/Delivery	$3.40	$5,100.00
Re-Process Corrected Returns	$3.14	$4,710.00
Email Instructions to PDF Clients	$3.00	$4,500.00
Partner Review/Physical Handling of Return	$10.63	$15,945.00
Tracking 8879s	$3.00	$4,500.00
8879 Follow-ups and Reminders	$3.00	$4,500.00
Opening Envelopes & Scanning Paper 8879s	$2.66	$3,990.00
Voucher Management & Reminders	$3.00	$4,500.00
Total	**$47.25**	**$70,875.00**

SafeSend One Process - Essential

Pricing and figures from 2016

Description	Price Per Return	Total for 1,500 Returns
Price	$15.00	$22,500.00
Labor—Estimated Admin Time	$2.08	$3,120.00
Total	**$17.08**	**$25,620.00**

Savings Per Return: $30.17
Annual Savings with the SafeSend One: $45,255*

*Includes: Unlimited eSign with eSignatures and Unlimited Extensions.

SafeSend One Process - Preferred

Pricing and figures from 2016

Description	Price Per Return	Total for 1,500 Returns
Price	$17.00	$25,500.00
Labor—Estimated Admin Time	$2.08	$3,120.00
Total	**$19.08**	**$28,620.00**

Savings Per Return: $30.17
Annual Savings with the SafeSend One: $45,615**

**Includes: Unlimited eSign with eSignatures, Unlimited Extensions,

The Intangible Benefits That Matter Most

Beyond the dollars and cents, Honkamp identified the following intangible benefits of using SafeSend One Tax Returns:

- **Enhanced client experience:** Faster, more efficient, less frustrating
- **Increased staff morale:** Less tedious work, more strategic focus
- **Modernized firm image:** Clients see Honkamp as innovative and tech-forward
- **Remote compatibility:** Works seamlessly for both firm and clients

Taking Integration to the Next Level: **The API Advantage**

How Honkamp, P.C. Eliminated 300 Hours of Manual Work During Busy Season

While SafeSend One solved Honkamp's delivery and eSignature challenges, they soon identified another opportunity: The manual tasks happening after clients signed their documents. Working with SafeSend's development team, they implemented an API integration that would reduce hours of manual work during the post-signature workflow.

The Hidden Bottleneck

Even with electronic delivery and signatures through SafeSend One, Honkamp staff still faced time-consuming manual tasks after each client signed, including:

- Manually releasing returns in their tax software
- Updating workflow statuses across systems
- Saving signed forms to their document management system
- Cleaning up dashboards and archiving completed jobs

"We talked with SafeSend about how we can automate our post-signature process," said Bob Fink, Chief Information Officer at Honkamp, P.C.. "We learned that APIs with webhooks were becoming available. SafeSend One could tell us when the client signed returns, and what information we would need to take that return to the next steps. It was very exciting."

Bold Implementation During Busy Season

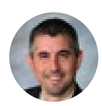
Most firms wouldn't implement major workflow changes during busy season, but Honkamp P.C. took the leap in February 2023. The result? Once staff saw the time savings, they embraced the change immediately.

"Two days before the deadline, we were asked to shut off the API so that the team could manually ensure all the i's were dotted and t's were crossed," Fink said. "They made it about half a day before they told us to turn it back on."

The Results Speak Volumes

The SafeSend One API integration delivered measurable improvements across several places:

- 90 seconds saved per return through eliminated manual processing.
- 4 manual processes eliminated from their workflow.
- 300 hours reclaimed during busy season, equivalent to nearly two months of full-time work.
- $96,000 in labor cost savings through pure efficiency gains.
- 1 minute turnaround time from delivery to signature.



"I could not imagine staff picking up these manual tasks and having to click through these screens ever again. We're not going back."

Bob Fink

Chief Information Officer, Honkamp, P.C.

Beyond Efficiency: From APIs to M&A

Automation has become a key driver in Honkamp's merger and acquisition strategy. New teams from acquired firms quickly recognize the value and embrace the automated processes, making integration faster and more seamless.

"This is one of those things the staff have really loved to be able to jump on right away," Fink notes. "Once we talk about, 'Hey, we're going to automate the stuff, and you literally don't do it anymore,' it's a pretty quick win."

The Client Experience Advantage

While Honkamp benefits operationally, their clients get to see dramatic improvements, too. Many clients now complete the entire signature process within 60 seconds of receiving their tax documents—a process that could previously take weeks.

The automation ensures returns move from signature to submission almost immediately, leading to happier clients and increased confidence in Honkamp's services.

The Future of Firm Operations

Honkamp's journey from paper-laden processes to API-driven automation tells the story about what's possible when firms embrace digital-first thinking. Their experience shows that technology adoption isn't just about solving today's problems; it's about building processes that scale with growth and adapt to changing client expectations. All the while, it improves company efficiency, reduces costs and optimizes the staff time and productivity.

The combination of process automation, electronic delivery, and seamless system integration has positioned Honkamp, P.C. as both an early adopter and an industry leader. They're not just keeping up with change—they're staying ahead of it.

About SafeSend®

SafeSend's mission is to solve real-world firm problems through innovative automation technologies. We help tax and accounting practitioners work more efficiently and serve their clients better, while making their lives easier and work more enjoyable.

SafeSend offers several foundational automation software solutions within SafeSend One™. Our tax returns product is a multi-year winner of the CPA Practice Advisor Technology Innovation Award and has redefined the way accounting firms assemble, deliver, and capture eSignatures from clients for completed tax return packages.

About SafeSend One™

SafeSend One is the end-to-end solution that automates the entire tax process, from gathering to delivery, offering firms an all-in-one solution to provide an unrivaled client experience. A secure and easy-to-use product for engagement letters, file transfers, organizers, eSignatures, and tax return assembly and delivery, now with a new and innovative AI-driven gathering capability.

Visit the SafeSend One page of our website to learn more about automating your tax engagement workflow and schedule a demo!

Visit safesend.com to learn more about our technology solutions.

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