

HubSync transforms the Tax Industry through OnTask Integration

CASE STUDY

Overview

The CPA profession has long been plagued by fragmentation and inefficiencies when it comes to consolidating information related to an individual taxpayer. Gathering that data from multiple physical and digital documents is both labor-intensive and highly prone to manual error without a single source of truth for client management that synchronizes across a range of tax platforms, ERPs, and CRMs. Even after the information has been consolidated, it can be easily misplaced or overlooked in poorly secured email correspondence. The team at HubSync set out to create a platform that could disrupt the market by dynamically bringing all of that tax preparation work into a single, fully customizable view.

Challenges

Building the software that could automate those processes from end to end required a deep level of understanding about how tax information needed to be gathered and moved through a consolidated workflow. Thanks to the HubSync team's deep experience in building tax technology solutions, they had little difficulty designing an all-in-one digital, customer-centric platform that could transform the way CPAs manage the tax data collection process.

HubSync opted to integrate a solution into their SAAS platform to accelerate their time to market vs a "build from scratch" approach. After evaluating several options, the company chose to use OnTask based on the maturity of the Accusoft brand, which has been in business for three decades. "We view these decisions as long-term strategic bets for our company and our clients," HubSync CEO John McGowan explained. "Outside of just the product, the most important decision criteria for us was the maturity of the organization and willingness to partner with us for the benefit of our clients."



Established by a group of veteran tax professionals seeking to modernize accounting technology, HubSync provides a SaaS platform that digitizes, unifies, and automates the tax process to improve both the client experience and CPA productivity. By streamlining the collection of tax information, enhancing communication, and reducing complexity through one secure platform, HubSync empowers tax professionals to focus more on advising clients rather than wrangling disparate data and dealing with cumbersome manual processes.



We really like the people a lot and they brought a tremendous amount of value to the table.



— HubSync CEO John McGowan

Challenges (Continued)

Despite the longevity of its parent company, OnTask shared the same market-disrupting mentality as HubSync, which made the platforms an ideal match. Unlike many competing workflow solutions, OnTask was designed to be an end-to-end platform that's entirely insulated from external dependencies. In addition to being fully HIPAA, FERPA, and SOC 2 compliant, OnTask doesn't require any additional plug-ins, licensing, or ongoing consulting engagements. Given HubSync's high volume usage needs, an all-in-one digital workflow platform offered the flexibility needed to become a true disruptor in the tax preparation industry.

Results

The integration process proved to be quite smooth, partly because the OnTask team worked closely with HubSync to stretch the platform's functionality and add custom features to meet specific tax processing needs. Having an experienced, responsive team just a phone call away proved to be a huge benefit throughout the integration process, no matter what the situation happened to be. "When there was an issue, all of us show up, all of them show up, and we all solve the problem together as an integrated team," said McGowan.

After such a successful implementation, the HubSync team is continuing to look at ways they could integrate additional functionality from the OnTask platform. With the tax industry undergoing a sweeping digital transformation, HubSync has the right partner in place to disrupt the status quo and meet the emerging needs of tax professionals so they can advise their clients more effectively.

About OnTask

OnTask is a workflow automation tool that makes it easy for users to create digital documents and forms for routing, review, approval, and signature. Whether internal or external, participants can work on documents and forms with ease, while giving administrators the ability to track files as they travel through review, and gain acceptance through verified digital signatures. For more information, visit ontask.io.

About HubSync

HubSync's mission is to simplify and automate the tax preparation & consulting process for the tax and accounting industry with best-in-class technology and solutions enabling tax preparers and their clients to actually enjoy getting their taxes filed. The Top CPA firms and tax professionals have come to rely on HubSync's integration technologies to elevate their services and modernize their offerings. Visit www.hubsync.com to see an overview of all HubSync has to offer.