



INTELLIGENT OFFICE

# Accountants, CPAs, and Tax Preparers: Here's Your Efficient, Cost-Effective & Scalable Solution For Busy Season (And Beyond)

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## How to Office More Intelligent With Virtual Business Services

Virtual business services, including virtual office space and virtual office services, aren't new. Accountants, CPAs, tax preparers, and other professionals who provide financial services have successfully used these tools since the 1990s. Since those early days, virtual business services have provided an affordable and flexible solution for tax and accounting professionals.

Of course, things look a bit different nowadays, and the way you work has evolved over the past few decades. For starters, your modern laptop probably has an easier time handling complicated Excel spreadsheets.

## **Fortunately, virtual business services have also evolved to keep up with modern work.**

Modern meeting rooms are equipped with the latest conferencing technology. Office suites are modern and stylish, making them the perfect place to meet clients. Speedy WiFi is the norm in virtual office spaces, and quality providers will give you the tools you need to communicate effortlessly with a virtual assistant or receptionist.

However, the main benefits of virtual business services haven't changed much over the past few decades. Firms that make the switch to virtual business services often report:

- Dramatically reduced operating costs
- Greater productivity
- Enhanced client service and improved client satisfaction
- Finally having enough time to explore new practice development opportunities
- A dramatically improved work-life balance

Virtual business services have always been a smart, efficient, cost-effective, and scalable solution for any business that needs office space, administrative support, or both. They can help you save money on overhead, increase productivity, and more. **But, will they work for your firm and its clients?**

In this resource, you'll find all the information needed to answer that question.

## **Introducing: Virtual Business Services**

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Your workload varies dramatically throughout the year — wouldn't it be great if your overhead and administrative costs could ebb and flow, too?

The term "virtual business services" is a catch-all phrase that describes a vast array of on-demand and fully customizable business solutions. Accountants, CPAs, tax preparers, and other professionals in the financial services industry can use these tools to streamline the way their business operates.

Every provider will offer a different mix of services, but at Intelligent Office we break things down into two main categories: virtual office spaces and virtual office services.

## **Virtual Office Spaces: Physical Office Space & Meeting Rooms**

**(Professional office space without the restrictions of a traditional office lease)**

Virtual **office space** can be rented for as long (or as short) as you need. This is a great setup for accountants, CPAs, and tax preparers, especially during the busy tax season. Maintain an address all year long, or opt to use the physical space only when you need it most. No matter what arrangement you choose, you'll elevate your business's image and make powerful impressions on clients.

Individual office spaces are private, distraction-free zones designed to maximize productivity. Unlike your home office or a coffee shop, you'll even have a door to shut. These spaces are professionally furnished with comfortable furniture and standard office equipment like printers and scanners. All you need to do is bring your own computer and other small essentials.

Next up are virtual **meeting and conference rooms**. These spaces can be rented by the hour, day, week, or longer if needed. Each room has a projector and other essential technology (and support staff who can help you get set up before the meeting). Some providers, including Intelligent Office, even welcome guests, serve them coffee and water, and make sure they're comfortable.

With virtual space, your firm gains access to:

- Professional space to meet clients. Some providers have a franchise network with many locations in well-known commercial areas, which makes meeting with clients even easier.
- Flexibility during busy season and beyond.
- A discreet, secure, and confidential location to sign, pick-up, and drop-off important documents.

## **Virtual Office Services: Phone Answering, Virtual Assistants, & Virtual Addresses**

**(Because every firm could use some extra admin support)**

Before we explain the different types of virtual office services, let's try a quick thought experiment. Think about all of the miscellaneous "admin" tasks that need to happen in your business. Things like ordering office supplies, scheduling appointments, following up with clients, and answering the phone.

Now, imagine what it would feel like if you had a trusted assistant to take those responsibilities off your plate. To sweeten the deal even more, think about how much time and money you could save if you only needed to pay that assistant for the hours they work.

Similar to virtual office space, virtual office services are also on-demand and à la carte. You only pay for the support you need when you need it. It's an arrangement that's particularly beneficial for accountants, CPAs, and tax preparers since workloads increase dramatically during busy season.

## Phone Answering

Utilize **phone answering** services during the spring when spare time is limited, or delegate the handling of all incoming calls. This way, all calls are answered and there's no need to "task switch" every time the phone rings.

All phone answering providers will answer calls using your firm's name, but that's the baseline level of service you should expect. The right provider will deliver a fully personalized service. Your callers will never realize they're speaking to a virtual receptionist.

It's like having a dedicated, full-time receptionist on your team — for a fraction of the cost.

## Virtual Assistants

**Virtual assistants** are the ideal solution if you need a trusted professional to handle all of the firm's administrative needs. They can:

- Take over calendar management, including appointment scheduling
- Coordinate client pickup of important documents
- Receive and scan documents
- Conduct client intake
- Help with spreadsheet management

... and so much more.

## Virtual Business Addresses

Last, but certainly not least, are **virtual business addresses**. With this service, you can send and receive mail in prestigious office locations across the United States and Canada. Each address location also offers access to a private, locked mailbox.

You can use your new address on business cards, letterhead, your website, and elsewhere. Some accountants and CPAs even rely on virtual addresses for their satellite offices, which helps them expand their business footprint to new regions.

## **Virtual Business Services Help Finance & Tax Professionals Do More of Their Best Work**

**(It's all about working smarter, not harder)**

There's no such thing as one-size-fits-all when it comes to business. Fortunately, virtual spaces and services are fully customizable. Whether you're a sole practitioner or you manage a larger team, you can find the mix of services that best fits your firm's needs.

Use virtual office space as a supplement to a home office or traditional brick-and-mortar space. Employ the help of a virtual assistant or receptionist during the busy season, or all year long. At Intelligent Office, some of our members in the financial services industry even use virtual services and spaces to run the entire business. We've become an extension of their team.

Now that we have the basics covered, let's take a deeper dive into the benefits of virtual business services for accountants, CPAs, tax preparers, and other finance and accounting professionals.

## **How Finance & Tax Professionals Use Virtual Office Space: 3 Real-World Examples**

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Time and time again, finance and tax professionals that rely on virtual office space and virtual meeting rooms cite three big benefits to using these tools in their business: **lower overhead costs, increased professionalism, and confidentiality.**

Here's how these benefits play out in the real world.

### **Example 1: You need to meet with clients in a quiet, private space.**

Many accountants, CPAs, and tax preparers don't need a full-time, dedicated office. But, a flexible office and meeting space where they can meet clients in a professional environment is still important.

Meeting a client in a home office or public space is unprofessional (and far from private). Virtual offices, on the other hand, offer an affordable way to convey prestige, competence, and professionalism. When your clients walk into the lobby, they'll be greeted by a friendly receptionist and shown to your private office or meeting room. From there, you can carry on with business without fear of being interrupted.

At Intelligent Office, many members opt to schedule appointments back-to-back on certain days. Some schedule as many as four per hour. It's a great way to increase efficiency.

And when you don't need an office or meeting room, you don't have to pay for unused office space. It's as simple as that.

### **Example 2: Your clients are scattered throughout the metro area.**

With the right virtual space provider, you'll always have access to a great office, no matter where it's easiest for clients to meet.

Some virtual office providers (including Intelligent Office) have multiple locations that members can utilize. [Our network spans the U.S. and Canada](#), and many major metropolitan areas boast several officing options. Meet in the city, in the suburbs, or somewhere in between. No matter where you meet, you'll be in a strategically located office in a well-known business area.

### **Example 3: Clients need a secure location to drop-off and pick-up documents.**

During the busy season, you likely have clients who need to drop-off and pick-up documents. Both parties need peace of mind that those documents are secure, and virtual office space provides that reassurance. When documents need to be signed, you also know that there's a private space available.

As a virtual office member, you can also utilize locked document and file storage. Many virtual office spaces even provide access to document shredding, scanning, copying, and printing.

## **How Finance & Tax Professionals Use Virtual Office Services: 3 Real-World Examples**

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Tax and finance professionals who opt into virtual services find themselves with more time and less stress.

With a virtual assistant, you can spend more time on client work instead of frantically answering random calls. With all of the time you'll save, you'll also have more time for friends, family, and your favorite hobbies and passions. **Work-life balance can feel elusive, especially during the busy tax season, but the right support makes it entirely possible.**

With that in mind, let's explore some of the ways professionals just like you have utilized virtual business services.

**Example 1: You need additional phone support during tax season.**

When tax season begins, resources can quickly become stretched thin. Suddenly, there's no time to answer the phone or keep up with office administration.

The solution? Phone answering services, which are billed based on the number of minutes you use (and not a penny more).

The virtual receptionist will be equipped to answer client inquiries independently, and you can also train them on when an issue needs to be brought to your immediate attention. They can take over appointment scheduling, too.

Once tax season is (finally) over, many tax professionals decide to keep using a virtual receptionist to ensure clients always receive excellent customer service. It's an especially helpful solution for after-hours calls, or when you need some extra support to cover staff time off.

**Example 2: A tax professional needs extra help, but doesn't have the resources to hire full-time, dedicated staff.**

Most firms, big and small alike, could benefit from some extra administrative support. Many of those same businesses simply don't have the time to hire and train an administrative assistant.

With a virtual assistant, you don't have to worry about finding the time. Your virtual assistant has already been trained on the basics of administrative support and how to provide stellar customer service. All you have to do is train them on the specifics of your accounting or tax preparation business.

So, instruct your new assistant on how you prefer calls to be answered, which tasks are the most critical, and other particulars. Before you know it, you'll have someone who operates as an extension of your own team.

The right virtual services provider will make this part of the process easy and stress-free. At Intelligent Office, our members have access to an easy-to-use portal where onboarding information can be quickly shared with the team servicing your account. Confidentiality and discretion are heavily emphasized during our internal training sessions.

And here's the best part: You only pay for what you need, whether it's 10 hours of administrative support a month or a full 40 hours a week.

**Example 3: You know your firm's image could benefit from the optics of a premier business address, but the cost of a traditional lease is sky-high.**

First impressions matter, especially in this field. If you want clients to trust your firm with sensitive financial matters, a premier business address certainly helps. You don't need to sign a 24-month lease contract to reap the benefits, either.

With a virtual business address, you get all the benefits of a traditional office lease at an incredibly affordable price.

There's also another benefit to virtual business addresses: Professionals who want to expand their business can use this service in any city where they'd like to establish a local footprint. A virtual business address makes it easy to have multiple locations. You could have satellite offices across a single metropolitan area or a network of locations across the entire North American continent. No matter where your clients are, you'll always have a nearby office.

## **See How Virtual Business Services Can Transform Your Tax and Accounting Services Firm**

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Now that you've learned how virtual business services can help your business run more intelligently, efficiently, and profitably, [fill out this simple online form to receive a personalized quote for your business.](#)

Your local Intelligent Office branch will be in touch to help you develop a personalized program that's designed to save time, money, and energy. Certain locations even offer specific packages designed with accounting and tax professionals in mind. In addition to phone answering and administrative services, these packages include access to on-demand space for document review, witness and notary services, and other essentials.

No matter what solutions you choose, you can think of us as your Path to Freedom™, helping you achieve success – whatever success means to you.