

# AT PEAK PERFORMANCE

*Landis & Associates runs like a well-oiled machine with help from Practice CS*

**Landis & Associates** is a firm based in Lancaster, Pennsylvania. It operates with four team members and primarily serves clients in the retail, services and construction industries. Owner and founder Richard Landis describes the clientele as unique based on the location of the firm.

"We're in South Central Pennsylvania, right in the middle of the Plain community, so we work a lot with the Amish. It's very interesting introducing technology to them."

Technology was also the impetus for upgrading the firm's software.

"The accounting profession is changing dramatically. The world is becoming much more connected, and I think the more we can do as a profession to integrate that, to make it easier for our clients to get information, the more we can help them manage their business."

The firm became a Thomson Reuters customer in 2010, when they implemented Practice CS®. They've since added FileCabinet CS®, UltraTax CS® and myPay Solutions®.

Landis selected Practice CS to help manage deadlines, to document client communication, and to increase other firm efficiencies—like having the option to work remotely. "I wanted to get Practice CS up and running before tax season so I could get a project management system in place."

## THE HUB OF THE OFFICE

Landis describes Practice CS as the hub of the complete software environment in their office.

"When a new hire joins our team, the first thing I tell them is that everything goes through Practice CS."

Practice CS has freed the firm up to focus on client retention and to branch out into offering value-added services like consulting.

"I think a big part of being successful in any business, especially the accounting business, is retaining your clients. I reach out to my clients through the year. It's not just about doing a tax return for them or preparing a financial statement. I want to help them with their business. I always tell my team we want to be proactive instead of reactive."

Landis says he was most impressed by how well the CS Professional Suite® products integrate, and that even though he initially only purchased Practice CS, he had plans to add other products in the near future.

"I think the power of the suite is to do things one time, and then push it out among the other products and modules."

## PRACTICE CS®



**LANDIS & ASSOCIATES, INC.**

*Rich Landis*

## ABOUT LANDIS & ASSOCIATES, INC.

Based in Lancaster, Pennsylvania, Landis & Associates, Inc. operates with a staff of four. The firm specializes in serving clients in the retail, services and construction industries. Additional services include accounting, payroll, business consulting, tax planning and preparation for individuals, and more.

## WEBSITE

At [landiscpa.com](http://landiscpa.com), the firm offers a wide range of online services including tax tips and forms, payroll forms, financial calculators, and secure client portals.

## SOFTWARE AND SERVICES

In addition to Practice CS, Landis & Associates uses FileCabinet CS, myPay Solutions, NetClient CS®, UltraTax CS, and Web Builder CS®. They plan to start using Accounting CS® in the near future.



THOMSON REUTERS™

# PRACTICE CS

## MAKING VALUABLE CONNECTIONS: SYNERGY USERS' CONFERENCE

Richard Landis, owner and founder of Landis & Associates, attended his fourth SYNERGY Users' Conference in November 2014. Not only was he able to take advantage of great breakout sessions and training opportunities, he said it was the networking opportunities that were the most beneficial for him.

"I think getting together, having that ability just to reach out and talk to other users to find out what's working for them, is the most important part of the experience. The roundtable discussions are always very valuable too. I always come out of the conference feeling renewed and with one or more ideas from others that I can implement into my practice."

For Landis, the conference is a good break from his regular daily routine, providing a much-needed respite that lets him just focus on learning and exchanging ideas with others. He goes on to say that with Practice CS running his firm, he has confidence that his clients will be taken care of even in his absence.

## THE MOVE TO ULTRATAX CS

It didn't take long for Landis & Associates to realize great efficiencies using Practice CS, so despite using another software product for more than 15 years, Landis decided to purchase UltraTax CS.

"I would say one of the most powerful features of UltraTax CS—and the one that made the biggest impact—is how the work flows from the paper over to the final product. You don't have to hop over here and go over here—everything's right there."

It was a decision that paid off quickly. The firm was impressed with how much easier it was to prepare returns.

"The move to UltraTax CS was definitely a positive one. Increasing efficiency and decreasing the amount of time it took to prepare a return—something I noticed right away—obviously increased the profit margin on the returns."

The firm was also pleased with the ease of keeping its clients' demographic data current through automatic data sharing between Practice CS and UltraTax CS, since that was always a challenge with their previous software.

## A WIN-WIN FOR THE FIRM AND CLIENTS

Landis believes the support that comes along with any software implementation is as vital as the software itself. When asked to describe his experience with Thomson Reuters support, Landis doesn't hesitate: "Very smooth."

"We've had just a few times where an issue couldn't be resolved immediately, but in those cases we uploaded the tax return file to the customer support rep. It was very easy to do, and just a short time later the problem was fixed."

Impressed by the world-class support and its quick return on investment, Landis & Associates further broadened its client offerings with myPay Solutions.

"Before myPay Solutions, we were doing quarterly tax returns and payroll in house. When I looked at the productivity reports, it was a no-brainer that we should make the switch—and what a great decision that was. It has freed up time that we can now devote to providing other services to our clients. So it's been a positive experience—a win-win for myself, our firm, and the clients."

