HubSync

Product Overview

Workflow

Orchestrate Every Engagement from Kickoff to Delivery

hubsync.com

1 The Workflow Landscape

Workflow is where engagement profitability, quality, and client experience are won or lost. Yet most firms still manage engagements across spreadsheets, email threads, and disconnected tools — with status that is stale by the time anyone reads it. The category is crowded with adjacent solutions, but few are built to orchestrate a tax or accounting engagement from kickoff through delivery.

How Firms Manage Workflow Today

Approach	How It Works	Limitations vs. HubSync
Spreadsheets & Shared Trackers	Manually maintained grids of clients, due dates, and statuses	Stale the moment they are saved; no ownership, automation, or audit trail; break down at scale
General-Purpose Project Tools	Generic task boards and project templates adapted for tax	No engagement or return context; no tax-specific checklists, review notes, or sign-offs
Workflow Inside Tax Compliance Suites	Status tracking bundled with tax preparation software	Tracks status but does not orchestrate the work; HubSync layers configurable workflow, QC, and reporting on top
Disconnected Point Tools	Separate vendors for extensions, delivery, and tracking	Data does not flow between them; separate logins and no firm-wide view of the engagement lifecycle
Practice Management Systems	Time, billing, and client records with basic due-date tracking	Built for administration, not execution; no stage checklists, routing, or review workflows
Email & Status Chasing	Managers ask, staff answer, partners escalate	Consumes the firm's most expensive hours; no record of what was agreed, by whom, or when

Common Pain Points

- **No Single Source of Truth:** Engagement status lives in a spreadsheet, an inbox, a document folder, and someone's memory — and none of them agree
- **Status Chasing:** Managers and partners spend busy season assembling status instead of reviewing work
- **Ambiguous Ownership:** Work stalls at handoffs because no one is clearly accountable for the next step
- **Bolted-On Quality Control:** Checklists and review notes live outside the workflow, so QC becomes a scramble at the end of the engagement
- **Late Bottleneck Detection:** Capacity problems surface as missed deadlines rather than early warnings
- **Scope Drift:** Teams perform work that was never in the engagement letter — and never billed
- **Fragmented Systems:** Workpapers, deliverables, and e-File confirmations sit in separate tools, forcing re-keying and reconciliation

2 Why Choose HubSync

HubSync Workflow was built by tax and accounting veterans for the way engagements actually run. It is not a generic project management tool configured for tax, and it is not status tracking bolted onto preparation software. It orchestrates the full engagement lifecycle — phases, deliverables, handoffs, reviews, and sign-offs — inside the same platform that runs engagement letters, organizers, workpapers, delivery, and e-File.

Key Differentiators

- **Configurable by Engagement Type:** Define phases, statuses, deliverables, tasks, and routing rules for every service line your firm runs.
- **Role-Based Routing and Handoffs:** Work moves automatically to the right role, with clear ownership and status progression at every step, so nothing stalls.
- **Quality Control Built In:** Stage checklists, structured review notes, and resolution tracking are part of the engagement — not a separate process.
- **Automated Specialist Reviews:** Dynamic questionnaires trigger required specialist reviews and route work to specialist queues for accountable sign-off.
- **Visibility at Every Level:** Personalized dashboards for individuals, firm-wide oversight for resource managers and partners, live status for everyone.
- **One Connected Platform:** Native flow across HubSync modules, plus APIs and integrations that connect the systems your firm already runs on.

Business Impact

Firms that move engagement management into HubSync Workflow can expect:

- Less time assembling status, more time reviewing work
- Faster handoffs, with fewer engagements sitting idle between phases
- Earlier visibility into capacity constraints, enabling proactive reassignment
- Fewer items missed at review, because checklists and required sign-offs are part of the workflow itself
- Consistent execution across offices, service lines, and staffing models
- A better client experience, with fewer status inquiries and more predictable delivery

Risk, Quality, and Compliance

Beyond efficiency, HubSync Workflow strengthens the firm's control environment:

- **Complete Audit Trail:** Every status change, assignment, review note, and sign-off recorded with attribution and timestamp
- **Enforced Standards:** Firm-approved checklists and required reviews applied consistently to every engagement
- **Accountable Sign-Off:** Reviewer and specialist approvals captured in the system of record
- **Scope Alignment:** Engagement letters linked to workflow scope, reducing scope creep and unbilled work
- **Peer Review Readiness:** Documentation retrievable without reconstructing history from email
- **Role-Based Permissions:** Users see and act on only the work relevant to them

3 Detailed Product Information

Workflow Design and Orchestration

Every engagement type your firm runs can be modeled once and executed the same way every time, with room for the exceptions that real client work produces.

- **Engagement Type Templates:** Configure phases, statuses, deliverables, tasks, and routing rules per engagement type, with flexibility for firm-specific processes and evolving requirements
- **Stage-Based Checklist Templates:** Tie configurable checklists to each stage of a workflow so every required step is complete and nothing is overlooked
- **Role-Based Assignments:** Assign work by role rather than by individual, so templates hold as teams and staffing models change
- **Automated Handoffs:** Completion of one step advances status and routes the work to its next owner automatically — no manual coordination required
- **Deliverable-Level Tracking:** Track individual deliverables and tasks within an engagement, not just the engagement as a whole
- **Exception Handling:** Support firm-specific variations and one-off situations without rebuilding the underlying workflow

Real-Time Visibility and Ownership

Every person on the team gets a role-specific view of the work, and firm leadership gets the cross-firm picture needed to staff and steer busy season.

- **Personalized Dashboards:** Each user sees what is assigned to them, what is in motion, and what comes next
- **Firm-Wide Oversight:** Resource managers and partners see across offices, service lines, and teams for staffing and workload balancing
- **Clear Ownership and Accountability:** Every task has a named owner and a current status — accountability is never in question
- **Complete Activity History:** Updates, status changes, reassignments, and sign-offs recorded in a single searchable timeline
- **Flexible Views:** Grid, calendar, and Kanban views with search, sort, and filter across all workflow data
- **Bottleneck Detection:** Turn live workflow data into actionable insight — see where work is accumulating before it becomes a missed deadline

Quality Control and Compliance

Quality control is embedded directly in the workflow — not bolted on. Every review, finding, and sign-off is tracked, auditable, and tied to the underlying engagement.

- **Configurable Stage Checklists:** Standardize quality with configurable checklists tied to each workflow stage, ensuring every step is complete and nothing is overlooked
- **Structured Review Notes:** Capture reviewer feedback in a consistent format tied to the engagement rather than scattered across email
- **Resolution Tracking:** Track every finding through to resolution, with visibility into what is open and who owns it
- **Dynamic Specialist Questionnaires:** Engagement teams complete questionnaires whose responses trigger the specialist reviews the engagement actually requires
- **Pooled Specialist Queues:** Work routes to specialist queues where reviewers self-assign items and complete timely, accountable sign-offs
- **Full Audit Trail:** A complete record of every action, for internal quality control, peer review, and regulatory inquiry

Connected Platform and Intelligence

Workflow does not operate in isolation. HubSync connects across modules and integrates with external systems to create a single flow of data and work.

- **Document Management Integration:** Access workpapers and deliverables directly within the workflow, keeping everything connected, organized, and in context
- **Engagement Letter Linkage:** Link engagement letters to workflow scope so teams work to what was actually agreed, reducing scope creep
- **End-to-End Module Flow:** Data moves across Engagement Letter Wizard, Tax Organizer & PBC, Tax Workpapers, Document Management, e-Sign, e-File, and Analytics
- **Bi-Directional Integration:** HubSync partners with Thomson Reuters and IRIS to provide an elevated layer of tracking and analytics over their workflow tools, and integrates with other workflow products used across the profession
- **Bulk Updates:** Make bulk updates in HubSync and push them straight through to connected workflow tools
- **APIs, Integrations, and AI Agents:** Automate manual steps and surface insight through open APIs, integrations, and AI agents built into the platform
- **Analytics and KPI Reporting:** View firm KPIs with detailed drill-down reporting on demand, built on live workflow data

Built for Every Engagement Type

HubSync Workflow is purpose-built for tax compliance, and flexible enough to run any engagement-based service your firm offers, including:

- Federal and state tax returns
- Extensions
- Tax provisions
- Sales & use (indirect) tax
- Notices and correspondence
- Audit engagements
- Advisory and consulting work
- Custom firm-defined engagement types

Who Uses Workflow

Role	What Workflow Delivers
Resource Managers	Firm-wide capacity view, assignment, and workload balancing across teams and offices
Staff and Preparers	A clear queue of assigned work with the required steps for each stage
Reviewers	Structured review notes, resolution tracking, and in-context access to workpapers
Specialists	Pooled review queues with self-assignment and accountable sign-off
Managers	Real-time engagement status, handoff visibility, and early bottleneck detection
Partners	Firm-wide oversight, final sign-off, and a complete audit trail for every engagement

BUILT FOR END-TO-END CONTROL

Standardize Where It Matters. Configure Where Firms Differ.

Firms do not need another tool to track work. They need one place where work is defined, assigned, reviewed, and delivered — with the audit trail to prove it. HubSync unifies workflow, quality control, and connected systems into a single platform, so your firm executes every engagement with clarity, consistency, and control.

Ready to run every engagement in one place?

Contact HubSync for a personalized demonstration at **sales@hubsync.com**