

Soraban Removes 140,000+ Hours of Admin Work, Turning Tax Workflow Bottlenecks Into Completed Returns

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In the heat of tax season, accounting firms face a familiar challenge: client volumes keep rising while staffing stays flat. The bottleneck isn't tax preparation itself, but rather the administrative work that comes before it. Documents arrive in scattered emails, files need manual sorting and renaming, and preparers often sit idle waiting for a single missing form.

A growing number of firms are turning to workflow automation tools for relief, and Soraban is emerging as one of the more influential client tax organizer platforms addressing this problem. Rather than focusing on static form-prep or tax calculations, Soraban tackles the firm capacity bottlenecks that slow down engagements before a return reaches the hands of a preparer.

"Most firms don't struggle with tax prep - they struggle with everything around it," said Enoch Ko, Founder & CEO of Soraban. "Collecting documents, entering data, and getting returns out the door creates hidden drag. We built Soraban to remove the busy work entirely, so firms can increase capacity without adding staff."

Many firms report that administrative tasks consume more hours than actual tax preparation. Chasing documents, renaming files, and sorting uploads can occupy substantial staff time during peak season. This creates a mismatch: preparers bill fewer hours while admins work overtime just to get returns ready for review. But with Soraban, customers report saving 1-2 hours per questionnaire.

Soraban Collect functions as an intelligent intake layer that identifies what documents each client needs, organizes incoming files automatically, and gives the tax team visibility into what's missing across the entire client base. The system uses conditional questionnaires, rather than static organizers, that pull prior-year data to show each client only what's relevant. A returning W-2 employee sees only what changed since last year, not questions about rental properties or business income they don't have.

Once documents arrive, Soraban automatically identifies form types, separates mixed PDFs, renames files, and routes everything appropriately. This client tax organizer's ability to handle what used to be hours of manual sorting allows administrative staff to move directly to substantive work.

Early validation catches problems before they reach preparers. This shifts review upstream and allows preparers to begin work with better-organized information, reducing rework later in the engagement.

The platform also addresses client-side friction. Passwordless access, mobile-first uploads, and automated reminders work better for clients who aren't checking email daily or remembering portal logins. By providing a friction-free entry point, the system helps firms maintain steadier progress throughout the intake phase.

Beyond intake, the platform offers AI extraction feeding validated information directly into UltraTax CS, Lacerte, Drake, and CCH Axcess, all while maintaining SOC 2 Type II compliance for enterprise-grade security. Firms can use just the intake system or extend automation through data entry, return assembly, e-signatures, and tax payments, depending on their needs.

Soraban supports entity intake, year-round client requests, and engagements involving multiple document cycles. Firms maintain consistent procedures across different services, supporting training, capacity planning, and operational visibility.

The shift reflects a broader trend in professional services. Most tax software focuses on form preparation and compliance, leaving the work that happens before preparation begins ? document gathering, organization, and sorting ? largely unaddressed. Tools like Soraban are filling that gap.

As firms manage increasing workloads without proportional staffing increases, solutions that bring order to early-stage workflows are becoming operationally important. Soraban provides firms with a systematic way to reduce administrative strain, create cleaner inputs for preparers, and maintain predictable timelines throughout the season.

About Soraban:

Soraban is the most trusted and intelligent tax workflow automation platform that powers modern accounting firms. Purpose-built for accountants and admins and battle-tested through 5 tax seasons, we understand the pain. Soraban takes on tasks from client data collection, organizing workpapers, automating data entry to tax software, and the final delivery to the client. Letting firms use their time and expertise to create exceptional client experiences. Learn more at www.soraban.com

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