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Professional Practice Management Solution

When it comes to practice management, many tax preparation and accounting firms have gotten by, cobbling together a variety of systems that were never designed to share information with each other—let alone boost business performance, increase bottom ...

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CCH iFirm

When it comes to practice management, many tax preparation and accounting firms

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accounting firms, we knew there was a growing need for task automation, work flow centralization, job tracking and performance measurement, particularly among small to midsize firms that need their teams to consistently produce high levels of high-quality work for their clients.

Current customers who are putting CCH iFirm to work are experiencing straightforward improvement of job-driven workflow, which improves productivity and client service output not just during the busy first quarter—but throughout the year.

Practice management software is still a new concept to many tax and accounting firms, and their leadership teams may not truly realize how it works—or how it complements their tax-preparation software. If you're new to exploring practice management software, look for it to produce the following types of results:

On-Time Project Delivery

- Capture deadlines and manage teams to those deadlines
- Custom automated alerts guide timely implementation to ensure important filing dates are never missed

Heightened Accountability

- Measure the performance of your firm and your team members
- Save checklists on each job, along with who completed each section and who reviewed it – which is incredibly valuable for internal auditing purposes

Optimized Staff and Resource Allocation

- Monitor who is working on what job
- Track the progress and status of all jobs

- Manage priority task lists for each staff member working on a particular job

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Improved Billing Operations

- Capture and customize time entry in an easy, intuitive manner
- Invoice completed jobs through both email and bulk printing

Uncover More Extensive Insight

- Customize real-time reports to narrow in on specific detail
- Firm-specific dashboards display the information you want to know upon start-up

24/7 Accessibility – Anytime, Anywhere

- Look for a cloud-based solution that can be accessed from anywhere and nearly any device with an Internet connection

The introduction of practice management software demonstrates the new way of thinking about the year-round value that accounting firms deliver to their clients—and the growing shift from the narrow first-quarter focus. With the right solution in place, firms can maximize their existing resources, identify areas where new resources can help the firm grow and bolster performance—and stronger, deeper relationships—with their clients.

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recommendations and insights to the executive leadership team. Prior to that, he was at

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