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practices for CPAs. Automated solutions are increasingly accessible to practices of all sizes, helping many to drive significant productivity gains.

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Automation continues to sweep through the industry and disrupt traditional working practices for CPAs. Automated solutions are increasingly accessible to practices of all sizes, helping many to drive significant productivity gains. But beyond the headlines, and in practical terms, how can CPAs leverage automation to help their practice to become more efficient? And, in order to catch up with competing firms that may be more digitally advanced, how can they get started quickly?

Make an action plan

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There's a solution for it!

Whatever the process, there'll likely be an automated solution which can support it. Consider automating the following activities to improve your capacity:

Automate onboarding

There's a lot of paperwork involved when onboarding new clients, but it's so important to impress them right away with an efficient, hassle free process. Automated onboarding solutions take the pressure off, by helping accountants to create and track proposals, set reminders for clients and automate billing.

Automate payments / AR

Keeping on top of payments and cash flow is critical for business owners, and accountants can simplify this process with automation. Solutions can sync with accounting software to track expenses, process invoices and send alerts when supplier payments are overdue.

Automate time tracking

Scheduling as a small business is incredibly important, but can be complicated and time consuming to manage by hand. As an accountant, you can help clients to streamline this function with time tracking apps, which coordinate rotas and provide data-driven reports based on activity.

Automate data entry

Typing up data from bills and receipts into accounting software for your bookkeeping clients, is a painstaking process. And automating this one activity alone, can make a huge difference to the productivity of your practice.

Whilst automating this process is easy, the trick is to find a service provider which

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Don't forget to make use of free automated tools

As well as investing in paid solutions, there are plenty of automated solutions that just need an email address to get started with. For instance:

- Internal **collaboration apps** like Yammer and Slack, help teams to keep in touch, in the office or when working remotely
- Online **grammar checking** widgets like Grammarly can keep client emails and proposals free of typos
- **Automated conferencing tools** like PowWowNow schedules calls more easily across multiple regions, offering shared cost numbers to reduce long distance phone bills
- Zapier connects apps to help users save time by **automating workflows**, offering a range of subscriptions as well as a free version of the service

Empower your practice with automation

The strategic application of automation is a game changer, and those who are yet to adopt automated solutions, may be at risk of falling behind more digitally advanced practices. Automated solutions are typically incredibly user friendly, so practices can get started quickly, no matter how technically adept their team is. If practices already use accounting software such as Sage, QuickBooks or Xero, they can access a wide variety of add on applications through these vendors' marketplaces.

And remember, whilst it's great to have a more automated practice, continue to review the performance of new software as part of this journey. As automated applications are now abundant, there's plenty of choice. So hold your service provider to high standards and set targets for the time and cost saving you hope to secure when selecting a new solution.

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