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Every business owner knows that workflows are your company's map to efficient teamwork and consistently quality results. For this reason, it's worth your time and energy to make sure you're getting your workflow right.

Ideally, you want an efficient process where all business information can flow smoothly between your team members. Besides that, you'll want all tasks to progress without experiencing any bottlenecks to produce high-quality output and deliverables. With that in mind, a fantastic way to do that is to integrate technology into the mix.

Fortunately, CPA firm management software like Financial Cents does just that — every move of your accountant will be documented, every deadline is set, and each

client is accounted for. And investing time to get this workflow right will give you

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Whether your client is old or new, you want to give them the best experience, and when you're onboarding a new client, you want to impress them with exceptional service. Because of this, many accounting firms believe that onboarding a new client is a crucial process and should always be done right.

When you onboard a client, you ensure that your client progresses efficiently in your company and that you build a dynamic and solid relationship with them. Here are some factors your workflow needs to focus on:

- Length of onboarding;
- Availability of customer support;
- Clear onboarding steps;

This is why it's essential to use a reliable CPA firm management software like Financial Cents to ensure that you have effective client management from the moment they are onboard.

Workflow #2: Sales Qualification Workflow

A sales qualification process allows you and your team to understand the behavior of your leads. This way, you'll know if a lead has the potential to convert into a client based on how your services match their intent.

Here are some points that could help you have an effective sales qualification workflow:

- Clear vision of an ideal accounting client;
- Identify MQLs or Marketing Qualified Leads — those who are interested in your services;
- Utilize discovery questions;
- Remain responsive throughout the whole process;

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Having a singular location for all your business communications will ensure that no requests and messages fall behind and that everything is visible within the proper context.

The Bottom Line: Integrating CPA Firm Management Can Help Elevate Your Accounting Firm's Operations

One of the best ways to improve your firm's workflow is by incorporating CPA firm management software into your team's operations. This way, you'll get to keep track of your clients, your team's workflows, time tracking, and more.

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As the CEO of Shahram Zarshenas, spends his time helping accountants get visibility across their firm to prevent things from falling through the cracks. Prior to Financial Cents, he founded an investment banking firm that helped software companies scale and exit their business. [Financial Cents](#).

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