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**Mary Girsch-Bock** • Jul. 05, 2021



**Strategy**

**Strategy**  
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Prior to starting or expanding client advisory services, you may want to perform a quick check-up of your existing technology. While automation is always important for CPA firms in general, it becomes a vital component when you begin to offer additional services for your clients.

In particular, the use of an all-in-one platform can be particularly important to firms looking to expand their menu of services in order to automate and delivery quality performance to their clients. Here are a few things you may want to take under consideration prior to expanding your client offerings.

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### Use an all-in-one platform

Wouldn't it be great if you could manage your clients, manage employee workflow, create project budgets, employ a handy work scheduler, and create custom reports and analytics all from a single application? With an all-in-one platform, you can.

And as today's technology continues to evolve, you can choose from several different applications designed specifically for CPA firms that can offer all that and more.

### Decide what advisory services to provide

While moving to the cloud and using an all-in-one platform are important steps, before you do either, you should consider what advisory services you wish to offer your clients. Once you make that important first decision, finding the right software platform for your firm will be much easier. And if you're already using the cloud to currently manage most of your technology, moving to consolidate multiple systems into one can help decrease the number of time-consuming tasks you need to handle on a daily basis.

For example, if you still use a paper filing system to manage your clients, making the move to a document management system will eliminate the need to file documents regularly, while also significantly reducing the number of lost or misplaced documents. It will also ensure that all client documentation is one specific location, allowing you to focus more time on managing your clients and less time on managing your tasks.

Technology can play a major role in managing advisory services properly. Before starting on this new venture, make sure that you've given yourself the tools you need to succeed.

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