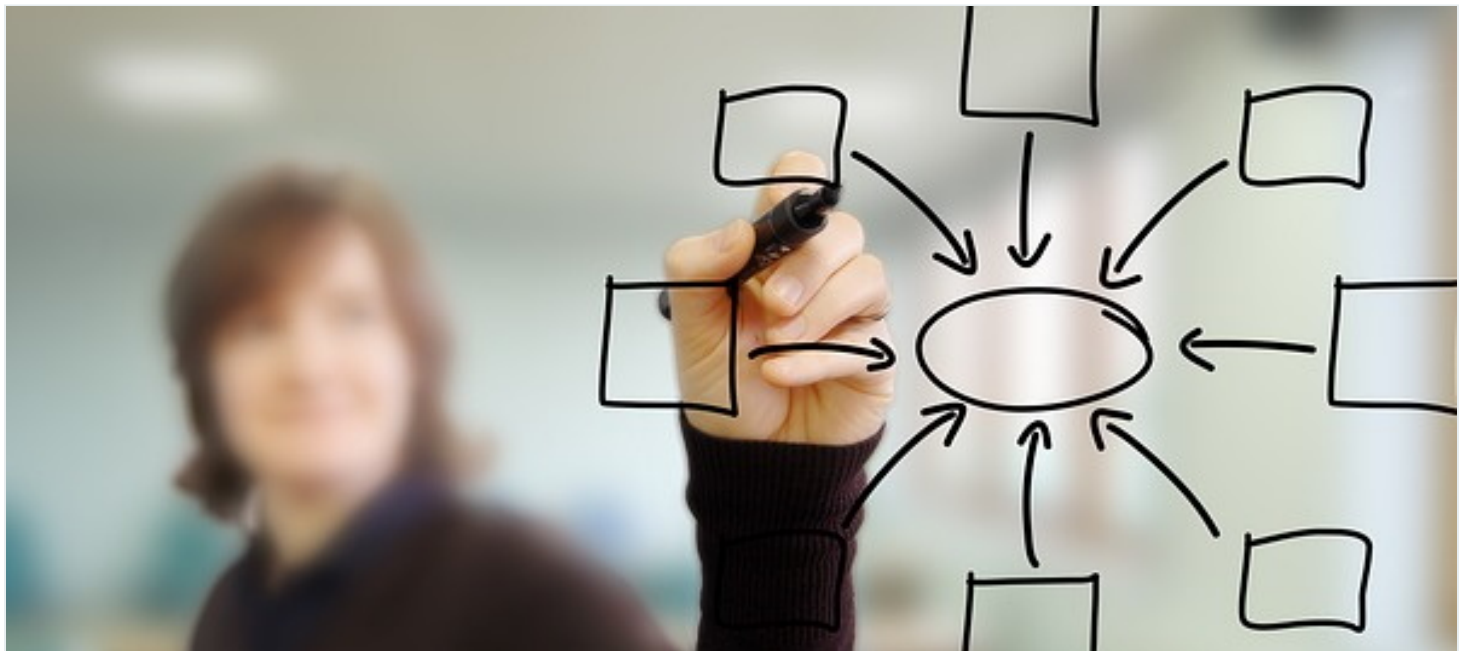


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consistently positive experience with your firm, the more likely they'll return and continue paying for your services. They'll even share the top-notch service they ...

Shahram Zarshenas • Nov. 01, 2021



Given the rapid speed at which worldwide companies are evolving, you may feel pressured to overhaul your practice and modernize it. Fortunately, it's not as complicated as it looks, thanks to CPA firm management solutions that are all available online. By going paperless, using project management for accountants, and looking for novel ways to handle your clients and staff, you'll be on the way to improving your processes and increasing your efficiency.

Modernizing your firm holds many benefits. For instance, when your clients have a consistently positive experience with your firm, the more likely they'll return and continue paying for your services. They'll even share the top-notch service they received from you and recommend you to their network, expanding your client base

even more. As the goal of modernizing is to optimize your processes and improve

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button on your client's case each time you require more information from them, particularly when their schedule doesn't correspond to your office hours.

Fortunately, using software designed specifically for CPA CRM or customer relationship management can do wonders for this aspect. You can securely send each other notes, requests, files, and questions, which means you won't risk having unanswered emails in your inbox. Using this software also comes with increased client transparency since they can track their case's progress even when you aren't constantly communicating updates. Additionally, thanks to CPA firm management, you can also increase your cash flow by offering online payment through the portal, ensuring punctual payments.

Improving Documentation Storage

Every accounting firm is familiar with wrangling dozens of tabs and multiple programs running at once on the computer. You probably have drawers full to the brim with paper clips and staplers, and your file cabinets are bursting to the seams with copies upon copies of documents. Not only is this a storage nightmare, but it's also expensive, as you'll keep having to purchase paper to maintain your document storage system.

Luckily, modernizing this area will not only cut costs but improve efficiency. Going paperless is another benefit of using CPA firm management to store your documents on the cloud, which means you don't have to dive through stacks of paper to find the information you need. You can access this data any time, anywhere, as long as you and your team have a strong Internet connection. Since the cloud updates real-time, you don't have to worry about sifting through seven versions of the same document; the latest version is always the one you'll access.

Enhancing Client Information Management

As someone running an accounting firm, you deal with a large amount of client

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about your clients.

Conclusion

Upgrading your firm's technology stack will produce enormous benefits for your staff and clients. Apart from eliminating some expenses, thereby increasing your savings, you'll also be processing requests more expeditiously. By modernizing your firm, you'll be well on the way to becoming the most competitive practice in your area.

Benefits • Firm Management • Technology

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