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With tax season coming to a close, it's time to take a deep breath, look around, and see what worked for your firm (and what didn't) this tax season. While you're at it, it might also be a good time to take a look at practice management systems that may be a good fit for your firm, particularly if you're still operating without one.

A mainstay in larger firms, there's plenty of reasons to use a practice management system in smaller firms as well. Designed to streamline workflow, practice management systems can also help you better serve your clients, including making it

customer details.

While most firms have applications that currently manage these tasks, in many cases they're separate systems that don't necessarily talk to each other. The beauty of a complete practice management system is that there is one single system that manages everything seamlessly, eliminating the need to manage your customer information in one system, assign workflow tasks in another, and bill for services in yet another. And if you found yourself busier than ever before this year, having a practice management system in place can help you analyze employee productivity levels as well as profitability levels.

But what if you have a system in place and you and your staff are still struggling with time management and timely billing? There are a few things you can do to get better organized, including the following.

1. **Don't just accept any client:** When building your firm, you're probably not in a position to be finicky when it comes to accepting new clients. But if you have an established firm, accepting any or all clients may not be a good idea. This is particularly true if you're looking to specialize, which we'll talk about later. For example, if you wish to concentrate on general tax preparation, you can probably feel comfortable accepting most clients. However, if you want to specialize in accounting services for small businesses, it might be best to limit the number of personal tax returns you take on.

2. **Review workflow management:** You get paid for your time. You must manage it well. Set aside a day or two for client meetings; whether they're in person or on the phone. That way, your work won't be interrupted by meetings. The same thing goes for staff. If you typically route documents to other staff members, make sure you have a process in place that will advise you if something is due or overdue. This is

particularly important during tax season when you're inundated with paperwork,

4. **Invest in the latest technology:** Investing in new technology is worth every penny invested. Get rid of those slow computers, temperamental printers, and all of the numerous small business software applications you're using and invest in one single application that can help you manage documents online, streamline workflow throughout the firm, and offers a client portal for better communication capability with your clients. Consider this your reward for making it through another busy season by giving yourself the tools to become and remain organized and efficient.

The best time to implement a new practice management system in your firm is now. Come January, you and your staff will be glad you did.

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