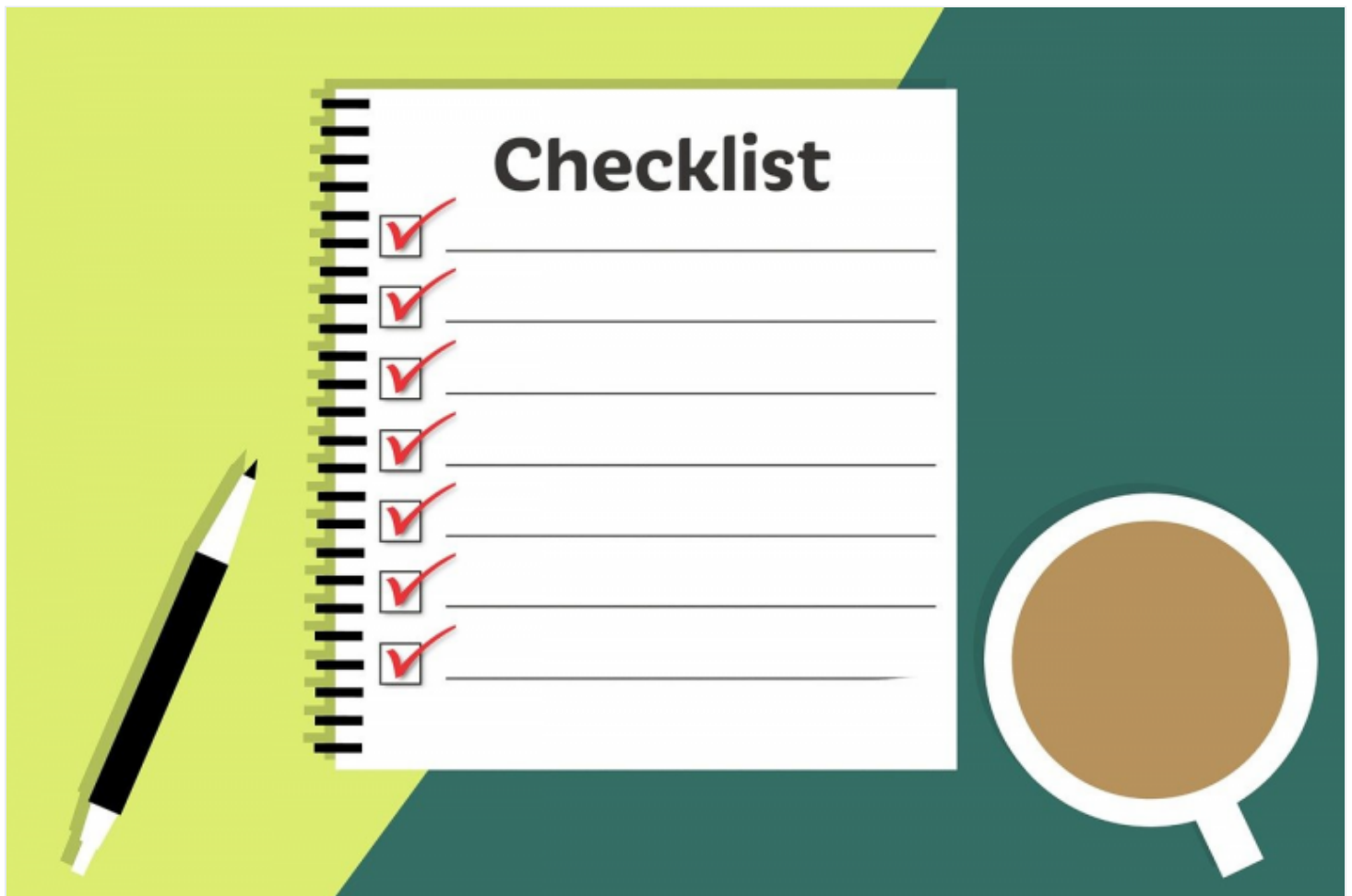


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onboard new clients every month, you have to train new staff members to handle the growing workload, and you need to keep track of everything to ensure nothing slips ...

Shahram Zarshenas • Apr. 21, 2022



As you scale your accounting firm, things can get complicated. When you hire more people and take on more clients, you'll run into unforeseen bottlenecks and inefficiencies.

We get it! It's frustrating, and you're looking for a solution. In this article, we'll help

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As your firm starts to grow, things become a lot more complicated. You start to onboard new clients every month, you have to train new staff members to handle the growing workload, and you need to keep track of everything to ensure nothing slips through the cracks. If you don't streamline your internal operations your processes will start to break and things will slip through the cracks.

It's your job to streamline your process place so your firm can continue to scale. If you don't, clients will become upset and your firm's growth will stagnate. So how can you solve the issue of scaling efficiently?

You need to streamline your [internal accounting workflows](#).

What do we mean by "internal?" You perform many external client-facing tasks at your firm, such as bookkeeping, tax returns, and year-end reviews. But you also perform workflows within the company, such as onboarding staff, onboarding new clients, and tracking leads.

When your company is smaller, the external [client-facing workflows](#) often get priority as you focus on delivering high-quality results and keeping your customers happy.

But as your company scales, it becomes crucial to focus on also streamlining your internal accounting workflows. Everything becomes more complex as you add more people, especially if your firm grows quickly. And if you're not careful, complexity leads to inefficiency.

Here are three key internal accounting workflows to focus on:

1. Client Onboarding
2. Staff Onboarding
3. Lead Tracking

So how can you streamline these three internal accounting workflows?

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