

Bright
Simply brilliant software

The secret to saving
your firm thousands
of hours a year



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Questions

Handouts


Recording

Email

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Presenters

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Content Marketing
Executive

Agenda

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1. The value of time
2. How to boost your onboarding speed
3. Transform your internal organisation
4. Other ways you can save time
5. Questions & answers



Onboarding

- › Just acquired a new client? Great!
- › All the work... Not so much
- › Need an efficient onboarding process set up from the get-go



Internal organisation



Internal organisation

- › Feel like you're constantly chasing your tail?
- › Deadlines falling (too easily) through the cracks?



Spreadsheets

- › Spend hours making the 'perfect' spreadsheet?
- › Don't swamp your team with hours wasted on inefficiencies



Communication

- › Deal with most problematic clients
- › Group similar clients together
- › Define your boundaries with them and set rules of engagement



Records and deadlines

- › Deadline is 31st of January or 31st of October?
Don't expect clients to send over information until just before the deadline
- › Set your own tax return deadline



Time tracking

- › Establish systems that track where valuable time is being spent



Emails,
emails,
emails...



Sinking in a sea of emails?

- › One of the biggest time vacuums in your firm
- › Valuable time could be spent elsewhere

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Chasing clients and payments

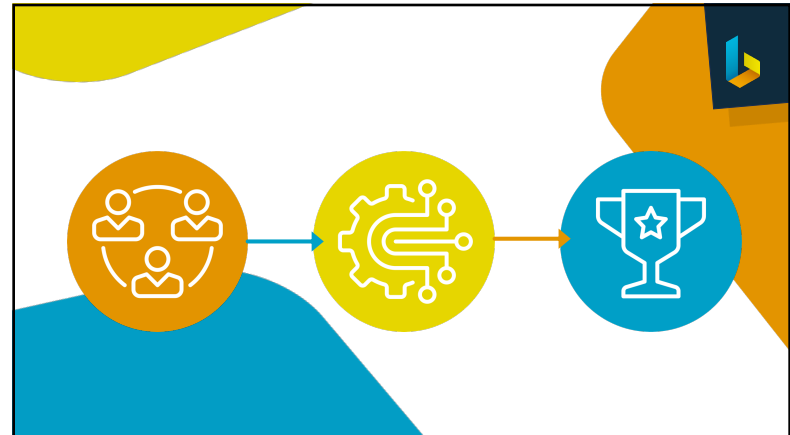
Get requests and payment reminders sent automatically for you

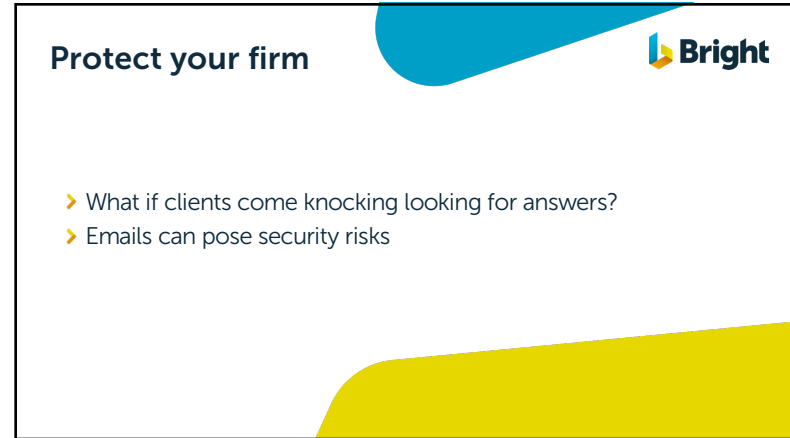


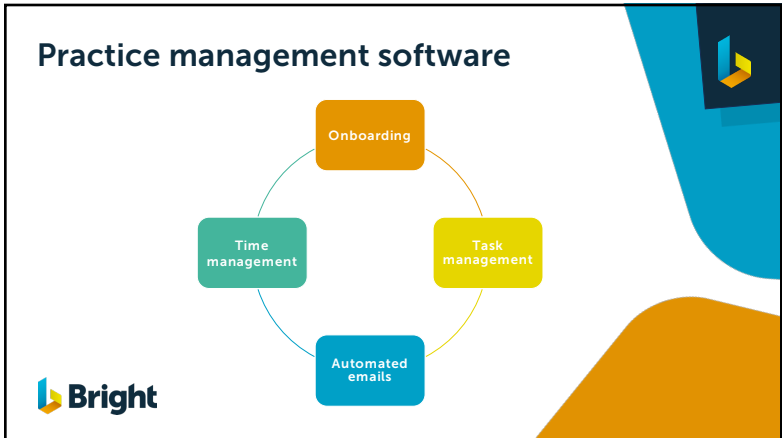
Let's do the math





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BrightManager
Multi-award-winning practice management software



Questions and answers

