

**Bright**  
Simply brilliant software

**CPD CERTIFIED**  
The CPD Certification Service

The secret to saving your firm thousands of hours a year

**Bright**  
Simply brilliant software

Accountancy, tax, practice management and payroll

brightpay    **AM** ACCOUNTANCYMANAGER    surf    **btc** SOFTWARE

Nothing is more valuable than time

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- › Clients are facing economic difficulties
- › How to help them navigate stormy economic waters?
- › Advisory services are great for extra hours, but also potential for downturn in business

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## Onboarding



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## Onboarding

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



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## Internal organisation



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## Internal organisation

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

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## 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...



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## 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

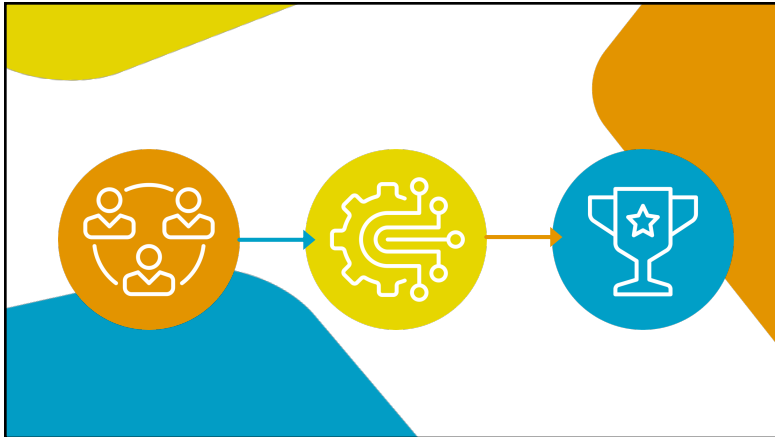


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## Let's do the math



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## Client data security



## Protect your firm



- › What if clients come knocking looking for answers?
- › Emails can pose security risks

## Improve your security



- › GDPR compliant portal
- › Audit trail
- › See it as bubble wrap or insurance for your firm



