

How to Take Your Practice to the Next Level with Practice Management

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Growing your practice is essential, but it can be difficult to do more when it feels like you're already stretched thin. Keep reading to learn how the right practice management solution can help you do more with your firm by providing the resources you need to succeed.

Do More with More

Too often, companies make major budget cuts to limit employee hours and ask employees to do just as much work, if not more work, with fewer tools, resources, or assistance. Practice management software changes that focus. Rather than asking your business to do more with less, practice

management software empowers you, giving you more tools to succeed and do more with your practice.

If you want to do more with your firm, you need a practice management solution that gives you more tools.



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Here are nine tools that good practice management tools provide your firm so that you can level up and do more.

1. Pre-made Workflows

Level up your firm by leveraging pre-made workflows. Workflows act like a roadmap of how to perform a variety of tasks. This can be as simple as processing a client's payroll to as complicated as filing yearly tax documents.

These workflows are a great place to start if your firm is just starting or you feel overwhelmed or don't know what to do with specific tasks. Each workflow serves as a starting point in better managing your practice. They help you better understand the needs of your clients and firm and the best practices in meeting those needs.

Using pre-made workflows, like those from IRIS's practice management solution, as the foundation of your practice, your firm levels up and provides a consistent level of service. Even if different employees work on the same account each time, workflows provide a checklist for any employee to follow that guides them through the entire process making sure that nothing is forgotten and that the client always receives quality service every time.

2. Customizable Workflows

Workflows act like a roadmap for your practice. They give you a set pattern and timeline that you can use to meet your goals and to make sure that nothing can fall through the cracks.

The pre-made workflows from IRIS are a great place to start, but we understand they are generalized workflows that might not provide you with everything you need. That's why all workflows are completely customizable.

A great way to level up your practice is to go from using our pre-made workflows to customizing them to your firm's specific needs or even creating them from scratch to cover the unique tasks and projects your practice faces.

No matter which route you take, IRIS practice management solutions are entirely customizable to help you have the support and structure that works best for you.



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3. Intuitive CRM

Your clients are the core of your practice. Without your clients, your practice wouldn't exist. That's why we provide an intuitive CRM to help your firm level up while building, tracking, and maintaining relationships with all of your clients.

Our CRM provides you with the tools you need to manage customer relationships via both email and SMS. Due to the broad integration tools that are available, this means you don't have to toggle between programs and tabs. IRIS puts everything in one solution to make managing your clients easier.

4. Secure Data Management

The rate of cyber and hacking attempts against accounting and finance firms is on the rise. [55% of CPA practices](#) and firms have reported that they have been the target of a hacking attempt. On average, a single attack will cost your practice [\\$200,000](#), and that does not take into account the stress a data breach adds to your clients and your relationship with them.

Having a great practice management solution means nothing if it doesn't help protect the sensitive, private data your practice deals with daily. That's why IRIS practice management solutions provide SSL certificates utilizing the latest cipher configurations. Our solutions ensure your and your client's data are always protected against data breaches and cyber-attacks.

5. Staff Planning

For your firm to work efficiently, every employee needs to carry the same weight. You don't want to have employees overwhelmed with tasks and on the fast path to feeling burnt out, and you also don't want to have staff members who do little or no work every week and provide very little value to the firm.

You need to level up your firm by utilizing staff planning tools. IRIS's practice management solution makes it easy to assign, track, and monitor the progress of each project and the employees working on it. This helps you ensure that each employee is receiving similar quantities of work and that everyone is carrying a balanced load.

6. Deadline Tracking

Deadlines in accounting, taxes, and finances are major dates you can't afford to forget about or miss. As your firm grows and you take on more clients, the number and diversity of deadlines start to pile up, and it can be difficult to keep track of everything.

IRIS's practice management solution makes organizing your deadlines easy and even sets up reminders and notifications for when deadlines are close or overdue. This helps ensure that every deadline is on time, helping you avoid fees while improving client satisfaction and retention.

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7. Task Management

Breaking your work into manageable tasks is the perfect way to organize your schedule, but not all task management software is created equally. You need software that allows you to collaborate and communicate with your entire team so that anyone can quickly see the status of the project and what needs to be worked on next.

IRIS's practice management solution provides a professional task management solution that gives you all the tools you need to succeed. Each task can be categorized and sorted as needed, allowing anyone assigned to them to access, edit, and update the task.

The best part is that tasks can be automatically generated. Rather than having to make a task every pay period for every client, IRIS's solution can be set up to automatically generate repetitive processes, making sure they're always on your calendar to complete without having to manually create them every time.

8. Automation

Manual processes are boring and repetitive. Because of that monotony, they are also the cause of most errors within accounting. To help save your time, money, and sanity, it's time to start leveraging automation.

Automation helps level up your firm by giving you whatever you need from you. Automation can remind you to complete the task yourself, or it can go as far as completing the task without any input from you.

Automation plays a significant role in leveling up your firm. It frees up your schedule allowing you to focus on more important tasks that need your talent and attention rather than bogging your work week down with mind-numbing manual processes.

9. Comprehensive Reporting

You love your job. Numbers, facts, and figures make sense to you. Your clients want to work with you because you're amazing at handling all of the information they don't want to deal with. However, even with your most trusting client, it's always important to communicate with them what you've done and what they need to be aware of in a way that makes sense to them.

Reports are a requirement when dealing with clients because it helps people outside of accounting and finance understand what is happening. A great way to level up your firm is by offering comprehensive reporting.

Comprehensive reporting from IRIS's practice management solution gives you the tools to create, customize, and share reports with your clients automatically. Rather than having to hunt around for reports, you can find everything you need in one simplified location.

Reports help improve your client relationships, and you can level up your practice by using reports to take a deep look at your practice. Comprehensive reporting can serve as a mirror to help you see how your practice is performing internally and give you immediate insights into the success (and any potential failures) you are experiencing.



Exceed Expectations with IRIS Practice Management Solutions

It's time you stop trying to do more by stretching yourself thin and working with your same limited resources, and time for you to do more with more. IRIS's practice management solutions give you more resources to grow your firm while saving time and money.

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