

Your Checklist to Get the Most from IRIS Firm Management



IRIS



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IRIS Firm Management solutions are professional tools built from the ground up with your firm in mind.

We aim to provide you with the tools and resources your firm needs to succeed so we can help you succeed. However, as great as those tools are, they are only part of the picture regarding your firm's success. To help get meaningful and lasting results, your firm has to do its part. Here is your checklist to help your firm get the most from IRIS Firm Management solutions.

1. Assess Your Current Tools

Before starting any project, you must assess what tools and resources you already have. This can help you identify gaps in coverage and possibly remind you of a forgotten lost gem you already have access to.

Start by listing all current software and tools you use for billing, time tracking, and client management. Identify the solutions, how you use them, the tools they provide, and whether they are integrated with your primary firm management solution. This will give you a better picture of the status of your firm and the strengths and potential weaknesses of your software solutions.

2. Identify Workflow and Bottlenecks

While assessing your firm, you should also identify its project workflows. This goes beyond identifying which software solutions are being used and analyzes how they are being used.

Keep an eye out for bottlenecks. Bottlenecks occur when the information and requirements inputted to a department, employee, or even software exceed the volume that can be processed. For example, if payroll is sent 150 checks to process

in a day but can only process 100 checks, that's a bottleneck.

Look at internal and external facing processes at all levels. At this point in the process, you are only responsible for identifying bottlenecks, not solving them. By doing this, you'll be able to target your solutions better to provide meaningful optimizations and lasting benefits.

3. Evaluate IRIS Features

Go back to the solutions you identified in the first step and see which solutions you can leverage to help alleviate the bottlenecks identified in the second step.

One of the most underused tools from IRIS Firm Management Solutions is IRIS's automation features. These features can significantly reduce and eliminate manual data entry and repetitive processes, giving your team time to work on more productive tasks. Ensure all applicable features are deployed to help streamline your operations.

4. Automate Client Communication

Once you have addressed your firm's bottlenecks, you can optimize some of your existing processes. One area that can be a significant time sink that optimization and automation can help is client communication.

Establish a clear, automated client communication process. This will be used for regular updates and check-ins, which can help improve transparency and collaboration with your clients without requiring a major time investment from your firm.

5. Develop Regular Training Sessions

Far too often, the powerful tools and solutions you already have are undervalued or underused. When

a simple tool like [a spreadsheet can be used to make a game](#), imagine what you can do with IRIS Firm Management's professional-grade tools.

Because your employees aren't trained or exposed to certain features of the software you use, they will continue to ignore it. The best way to fix that is by scheduling regular training sessions. Brief, consistent training sessions provide an opportunity to keep your staff updated with the functionalities of IRIS solutions and how to use them best.

6. Schedule Data Security Checks

Being passive about your firm's data security can leave you vulnerable to breaches and attacks. To ensure your firm is functionally optimal, create a schedule for reviewing your data security measures and compliance with regulations. The best practice is to perform a data security check at least once every quarter to ensure your data is properly protected.

7. Establish Feedback Mechanisms

Optimizing your firm is a continuous job. You hope that your new processes and solutions will help your firm, but it's not until time has passed and you're able to get feedback on your changes that you're able to measure the results and see if there were notable changes.

In this step of empowering your firm, establish a system for collecting feedback on the efficiency of internal and external workflows. For internal processes, use an anonymous feedback option that allows employees to share their experiences without fear of retribution. Look for feedback to help you get better insights into what is and isn't working within your processes.

8. Continually Monitor and Optimize

Just like traffic jams can happen **without an accident**, bottlenecks and delays in your processes can develop without any catastrophe or major event triggering them. To ensure you are continually moving forward, you should establish processes to monitor and optimize your firm continually.

IRIS Firm Management solutions allow you to access up-to-date information about your firm, giving you relevant metrics and insights and allowing you to adjust workflows as necessary.

9. Plan for Peak Seasons

Tax season is the most stressful time of the year, and depending on your firm, the few months leading up to April can provide more work and revenue than the rest of the year combined.

Plan ahead and be prepared when you use IRIS Firm Management to get the most from your tax season. By scheduling your resources and ensuring you have the talent and manpower to succeed early, your tax season can become less stressful and more profitable.

10. Review Client Satisfaction

The last step to improving your firm and getting more from your firm management solutions is to check in with your clients regularly. Sometimes, it is difficult to see how your firm is performing while inside it, so it helps to have an outside perspective.

To gain meaningful insights, communicate with your clients throughout the year. This helps you establish meaningful professional relationships with them built on trust rather than ignoring each other until tax season comes around once a year.

When you ask for feedback and hear their stories, focus on what they say regarding service, speed, and quality. These three factors are good benchmarks that can help you understand what is working well within your firm and which processes still have room for improvement.



Optimize Your Firm with IRIS Firm Management

IRIS Firm Management can serve as the foundation for your firm, providing you with a centralized, fully customizable solution for the lifespan of your firm, helping you reach your goals and achieve more. [Get started today](#) and discover the difference IRIS Firm Management can provide your firm.

IRIS Americas is part of IRIS Software Group. It exists to take the pain out of processes and let professionals working in CPA firms and businesses comply with regulations, drive productivity, and better engage with key stakeholders. Its brands include IRIS Star Practice Management, IRIS FMP, IRIS Innervision, IRIS Practice Engine, Doc.It, PSI Payroll, AccountantsWorld, Senta and Conarc.

IRIS works with thousands of CPA firms in North America, including 52 of the top 100 CPA firms in the US, and provides innovative solutions to serve accountancy customers in the North American market, making IRIS the go-to partner for CPAs. IRIS has over 100,000 UK and international customers, with 80% having a tenure of five or more years.

