Your Checklist to Save Time in 2023

Did you feel strapped for time in 2022? Reevaluate your workflow and reduce non-billable admin work using these tips to see how you can save time in 2023.

1   **Automate business processes**, especially simple tasks like creating files for new clients, sending follow-up reminders, fetching documents from 3rd parties, and collecting payments and signatures. Onboard new clients quickly and easily with an automated, streamlined process.

2   **Set your office hours to 24/7** by making sure your customers' important information is available to them at all times. Using a **secure client portal** allows your customers to access their documents on-demand, freeing up time for you that might have otherwise been spent sending (or resending) documents to customers.

3   **Send out documents electronically** including case files, ID checks and contracts. Not only will this lower your environmental impact, it will also mean documents are received by clients or stakeholders instantly – just make sure you're sending these via a secure system like SmartVault, and not via unencrypted email.

4   **Get organized**. Eliminating paper from your office and shifting from file cabinets to **secure online storage** is not enough – you will still face issues searching for documents if your file structure is unorganized. Make sure your online storage solution is working for you and can automatically route documents to their final destination and file them for you.

5   **Be compliant from the start** so you don't have to waste time re-doing work to bring it up to meet compliance requirements or dealing with costly legal issues that may arise in the event of a security breach. Setting up workflows to be compliant will also save you time on staff training – no need to host special compliance trainings if your staff learns secure practices from the start.

6   **Create repeatable workflows** using tech to set automatic notifications, create templates, and establish a centralized location for all of your client information and important documents to live. Integrating tools like **DocuSign** into your workflow and setting up custom templates to suit your business' needs saves tremendous amounts of time later when you can simply send out a form for signature with one click, have it routed back to the correct folder, and instantly receive a notification that a document has been signed.