

# The Many Hats of A Small Business Owner:



## Where Your Tech Stack Should Fall in Your List of Priorities

As a small business owner, you take on a single role that would typically encompass the work of five or six different individuals. Maybe more! You are your own admin, receptionist, bookkeeper, human resources rep, and marketer. You're doing all of this on top of doing your work as a CPA.

Having to be responsible for all of this work is not only exhausting but hinders your ability to focus on billable services. While many people think the first solution is to hire more people, this can also be costly and not necessarily something your small practice currently needs. Fortunately, sacrificing time or hiring more people aren't your only options.

If you find yourself doing a lot of manual work, chances are there is a software solution to automate that work and put more time back into your day. You can use this time to either relax or focus more on billable services. Whatever you choose, you'll find yourself enjoying your work more because you aren't wasting energy on redundant tasks.

There's nothing that can power up the profitability and overall performance of your practice like the ability to scale. Once you have a repeatable system in place, you'll be able to easily scale your practice and bring in more team members which can take the burden off you. If you really want to skyrocket your ability to serve more clients efficiently, while dramatically increasing your ROI, then you need to create a business model—and a connected tech stack—to support this goal.

Having the right tech stack in place allows your team to do their job effectively, which is essential for a growing firm looking to scale up. Once you have the right technology infrastructure and an expansion plan in place, you also need to ensure that you have the right tone at the top. As a firm owner, you are in charge of operations and you have the responsibility to give your employees the tools they need to succeed.



## How to Optimize Your Workflow With Your Tech Stack

So how exactly can you increase your net profit and reduce time spent in the office all while creating a scalable practice? The answer is to use a best-of-breed tech stack. Here's how:

The core of your tech stack begins with the right Document Management Solution (DMS). More than likely you are already using your favorite tax software in full force, however not all tax software comes with a built-in DMS or client portal. How can you process your client's taxes without a secure way of receiving and storing their most sensitive documents? For example, with SmartVault, users can have their clients submit all of their documents via the client portal, and once all files are received, users can start processing returns. Once they're done, the entire tax return package is returned back to the client through the client portal.

Next, you want to find an eSignature solution that integrates seamlessly with your DMS. DocuSign is a huge go-to for accountants and bookkeepers for example, and between that and SmartVault, users can send forms and invoices directly to their clients for eSign and payment approval and ensure that all returned signatures will automatically be returned to the client's folder.

This connected tech stack gives users the convenience of not having to attach files, move files between apps, or download/upload files from different locations. It removes lots of frictions in the tax preparation process, which saves time in admin tasks and gives back more time to do billable work.

## An ROI-Maximizing Best-of-Breed Tech Stack

Dawn Brolin, owner of Powerful Accounting, in Windham, Connecticut provides tax, accounting, fraud, and tax representation services to business clients. As far as building her tech stack goes, Dawn uses a systematic, profit-minded approach to continuous improvement.

Dawn's ROI-driven tech stack has given her the edge she needs to power up her practice by scaling her ability to serve clients, especially through the pandemic. By having the ability to scale her practice and create a remote team, Dawn has grown her business with a lower cost structure which adds revenue to the bottom line.

Dawn believes that the keys to her success are using the right connected technology solutions and honing her operational workflows. "If you think you are limited to a certain number of clients based on the number of hours you have in a day this is simply not the case," she states, "With the right processes and technology infrastructure, you can actually work less but deliver more in the same amount of hours." Get a copy of Dawn's exact tech stack here!

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Built with bank-level security, SmartVault offers a cloud-based document management system and client portal designed to help you reduce costs, raise productivity and employee happiness, stay in compliance, and deliver higher levels of service.

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