



The Busy Life of an Accountant

Tips for Making Time to
Optimize Your Workflow



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Do you often feel strapped for time during busy seasons? While you can't wave a magic wand that adds more hours to your day, you can improve your workflow and business practices to maximize your productivity at work. Here are six incredibly simple yet effective tips for you to save time today and in the future.

Tip 1

Automate business processes, simple tasks like creating files for new clients, sending follow-up reminders, fetching documents from 3rd parties, and collecting payments and signatures are repetitive tasks that can be automatically deployed through your tech. Need some suggestions for solutions to automate tasks like these? Check out SmartVault's integrations with popular accounting and business software.

Tip 2

Set your office hours to 24/7 by making sure your customers' important information is always available to them. 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.

Tip 3

Send out documents electronically including year-end accounts, tax returns and financial statements. 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.

Tip 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.

Tip 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. Storing documents in a secure system such as SmartVault means you'll be compliant with data security regulations and will avoid leaking personal data if you ever suffer a cyber breach.

Tip 6

Create repeatable workflows using tech to set automatic notifications, create templates, and establish a centralized location for all 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.

There you have it. The “top six” list for optimizing your accounting practice right now. A final piece of advice is not to procrastinate, get started now so that you and your team can start reaping the benefits as soon as possible.





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