Uncover the Real Reasons Your Workflow Breaks

Ask these 10 questions before the rush hits.

Instead of saying:	Ask yourself + your team instead:
“The client forgot.” *	“What in our process made it forgettable?”
“They didn’t send the right docs.” *	“Did we make it clear exactly what we needed — and when?”
“We’re always waiting on signatures.” *	“Do we make them jump through hoops to access and sign documents?”
“It’s just a busy time of year.”	“Why does the same week crush us every year — what bottleneck are we ignoring?”
“Someone must’ve misplaced it.”	“Do we have a system that prevents misplacing altogether?”
“It landed in the wrong folder.”	“Why is there still room for error — could routing happen automatically?”
“We’re still missing documents.”	“Are we tracking what’s missing in one place, or spread across emails?”
“The team’s working as fast as they can.”	“What repetitive step is burning time that automation could fix?”
“The client portal confuses people.”	“Is our client process simple enough for zero explanation?”
“We’ll fix it after tax season.”	“What tiny fix could we make now that saves hours later?”

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Okay… sometimes it really is the client.

Nick Boscia, CPA, calls it his **“Five Worst Clients”** list — a yearly reset where his team nominates the clients who drain their energy. Those clients get fired. The list gets smaller every year. It’s *not* about being harsh — it’s about protecting your team.

Learn how Nick implemented this + other workflows to build a happier, more balanced firm in “The Balanced CPA eBook.” →

SmartVault anchors firms in document management — connecting the tools, workflows, and people that keep their practice moving — and makes work feel exactly like it should: organized, secure, and seamless. Learn more today: www.SmartVault.com

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