HOW TO STAY AHEAD OF THE CURVE AS A MODERN CPA FIRM

1 INNOVATION

CPA firms need to be more innovative than ever before. With new laws and regulations constantly being passed, it's crucial that firms have the latest tools and technologies in order to stay compliant and efficient.

TECHNOLOGY 2

Technology has changed the way that CPAs work in a number of ways. Perhaps the most significant change is the way that information is accessed and stored. In the past, all information was paper-based and had to be physically filed away. Today, however, most information is digital and can be stored on a secured cloud network. This is the turning point for all firms. With virtual workforces and the advancements in Ai, you can now streamline the tracking of projects and WIP and billing. Ready to step up that efficiency and visibility? Game on, so are we.

3 COMPLIANCE

The compliance landscape is constantly changing, and CPAs need to be prepared for anything. New laws and regulations are being passed all the time, which means that firms need to have the latest tools and technologies in order to stay compliant. Easily track deadlines and changes on projects or client needs all on a dashboard accessible to those who need it.

REPORTING 4

Accurate reports and real-time data delivered to your dashboards can be a game-changer. No one has time to ask multiple people to pull different reports and merge them into some form of analytics that we can derive decisions from. Reporting needs to be accurate and timely. Knowing where you're headed before you get there. Knowing today's numbers before the week's end is crucial to making better business decisions for your firm and your customers.

5 PRODUCTIVITY

I think we all can attest that better task flow and tracking would help any firm create more efficiencies and spend less time tracking things down and more time putting in the work. Skip the cover sheets and checklists, and know where things are from your dashboard. Gain insight to make deadlines before they are due and stay ahead of those extensions. Who knows, maybe you will save enough time to do more advising for your clients, I bet they would love that.

CUSTOMER RELATIONSHIPS 6

Creating time to advise your clients is crucial in today's climate customers expect quick responses and results. What tools do you have to help your employees be successful? PracticeERP helps companies connect the dots across CRM, client services, workflow/task management, time/expense tracking, work in progress, billing automation, accounting, and financial and business intelligence.

7 IT MANAGEMENT

As a CPA firm, your data and information need to be stored securely. This is where the strength of Oracle NetSuite's worry-free data management comes into play. Your data is completely replicated, backed up, and available whenever and wherever you need it. Multiple levels of redundancy are provided to ensure continuous access to your data, and replication and synchronization across data centers provide you with full disaster recovery confidence.

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