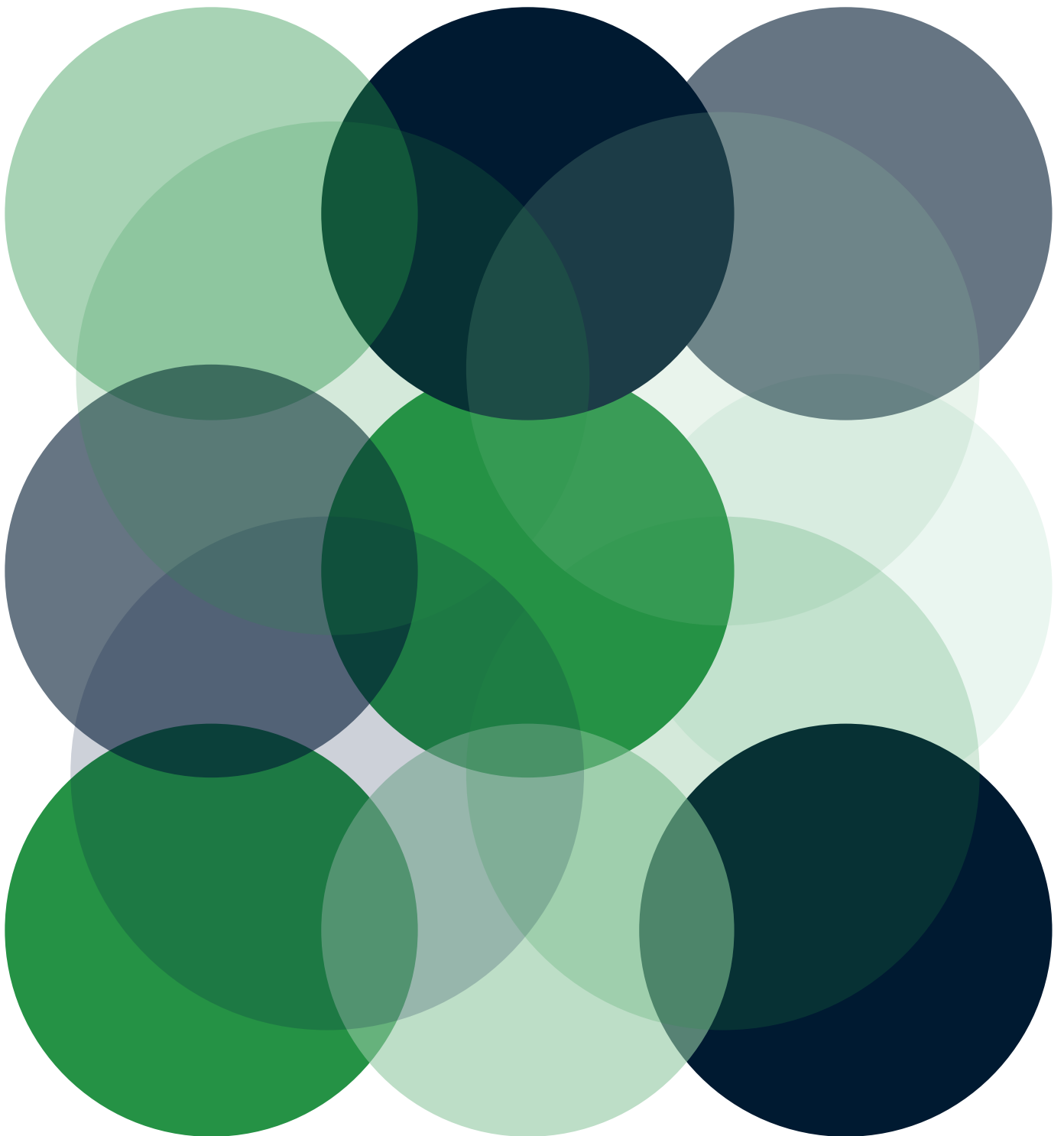


The Firm Automation *Playbook*



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Introduction

The firm automation playbook has helped hundreds of accounting firms automate their most time-consuming processes.

Automating your firm will allow you to improve work quality, increase profitability save time and scale faster.

Following the steps on the right will help you successfully implement the frameworks to automate your accounting firm.

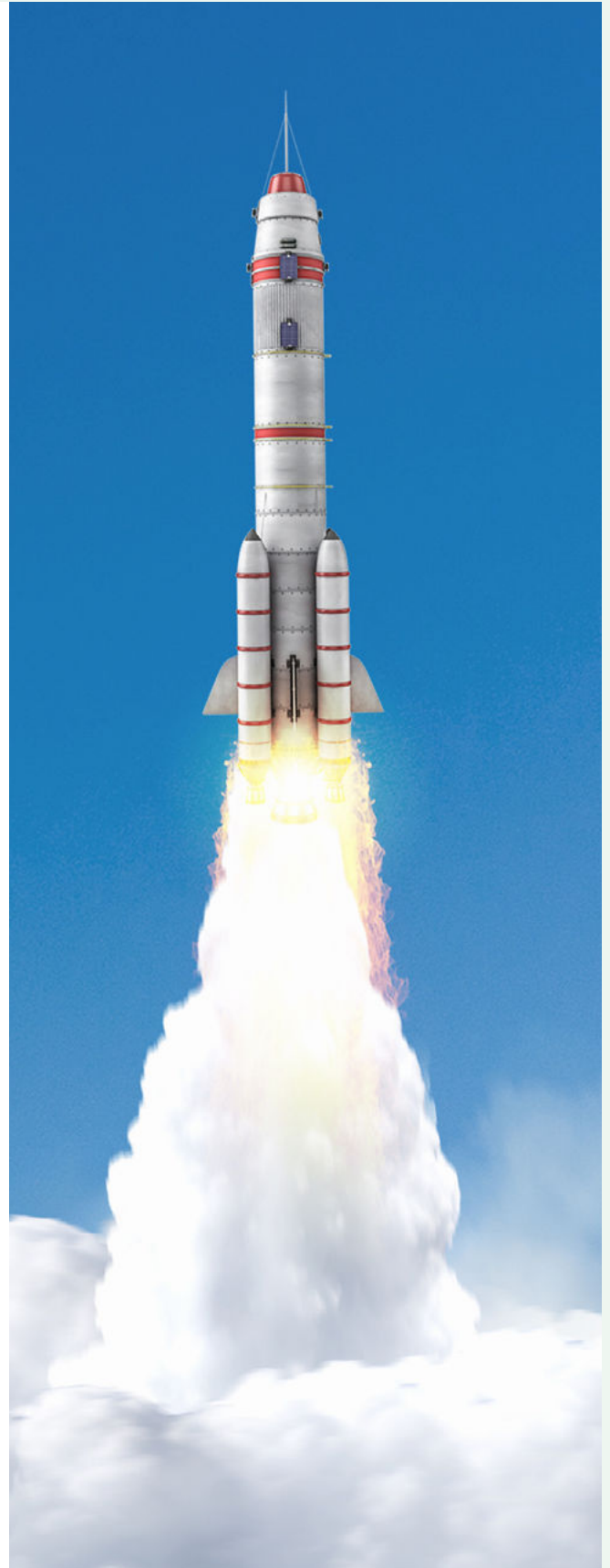
Looking for a better way to track client work, collaborate with your team, and organize client information?

[Check out Financial Cents →](#)



Shahram Zarshenas

Co-Founder & CEO,
Financial Cents



Your Average Work Week

Spend a week tracking how you spend your time each day for a week. You can do this with an actual time tracking system or by just writing it down on a piece of paper. At the end of the week, sum up the total time spent on each activity and list it out in the table below. See our example to the below. Once finished, identify the processes that you can automate with technology. Check out our [Firm Automation Tech Stack](#) for help.

EXAMPLE

ACTIVITY	TIME SPENT (HOURS)
Scheduling calls	2
Writing emails	5
Collecting client info	5
Client meetings	6
Invoicing clients	2
Payroll work	10
Bookkeeping work	10
TOTAL HOURS	40

YOUR AVERAGE WORK WEEK

ACTIVITY	TIME SPENT (HOURS)
TOTAL HOURS	

Firm Automation Tech Stack

The ultimate firm automation tech stack to help you automate the most time-consuming parts of your process. Once you have identified which technology you want to implement, go to the [Automation Priority Matrix](#) to identify what to implement first.

ACTIVITY	ACTIVITY
Scheduling calls	 Acuity
Email templates	 Streak
Managing & tracking client work	 Financial Cents
Chasing down clients for information	 Financial Cents
Client Communication	 Liscio
E-signature	 Financial Cents
Capturing receipts	 LedgerSync
Month end review process	 Nett Tracker
New client engagements	 Ignition
Payments	 Ignition
Uncategorized transactions	 Uncat
Team collaboration	 Financial Cents
Reporting (work status)	 Financial Cents
Financial Reporting	 Genius Sheets
Payroll	 Wagepoint
Data quality control	 Dext Precision
Expense management	 Dext Prepare
General ledger accounting	 QuickBooks Online

BENEFITS OF AUTOMATION

In this example, you can see how much time automation can save your firm every week.

ACTIVITY	BEFORE	AFTER	TIME SAVED
Scheduling calls	2	0	2
Writing emails	5	2	3
Collecting client info	5	0	5
Client meetings	6	6	0
Invoicing clients	2	1	1
Payroll work	10	8	2
Bookkeeping work	10	7	3
Total Hours	40	24	16

Firm Automation Priority Matrix

This matrix will help you identify which automation processes to automate first. You will take the activities you chose to automate and categorize them into each section below. See the example below.

EXAMPLE

	MORE TIME SAVED	LESS TIME SAVED
EASY TO AUTOMATE	1st <i>Client data collection (5 hours)</i> <i>Writing emails (3 hours)</i>	2nd <i>Scheduling calls (2 hours)</i>
HARD TO AUTOMATE	3rd <i>Monthly End Review (3 hours)</i>	4th <i>Payroll (2 hours)</i> <i>Invoicing Clients (1 hour)</i>

YOUR FIRM

	MORE TIME SAVED	LESS TIME SAVED
EASY TO AUTOMATE	1st	2nd
HARD TO AUTOMATE	3rd	4th

Once categorized into each section, you will want to add each activity to your [Automation Roadmap](#). (Recommended order for implementation labelled).



Automation Roadmap

Add the items from your [priority matrix](#) to your automation roadmap on the next page. This will clearly define what you will implement and automate first in your firm. Make sure to assign someone responsible and add estimated timelines. Remember that its important to only implement one solution at a time. This will ensure proper adoption by your team and a successful implementation. This roadmap will help keep your team focused.

BENEFITS OF AUTOMATION

- ✓ Show your team how to use the new technology. You or the software company can demo it for your team over lunch and learn.
- ✓ Clearly explain the benefits to your team and how it will make their lives easier
- ✓ Have a follow up meeting with your team after a week to reinforce everything or answer any questions they may have.

	PROCESS	TECH	OWNER	IMPL. START	IMPL. END
1	Collecting client info	Financial Cents			
	Notes:				
2	Emails	Streak			
	Notes:				
3	Scheduling calls	Acuity			
	Notes:				
4	Monthly Review	Autoreview			
	Notes:				
5	Payroll	Gusto			
	Notes:				
6	Invoicing Clients	Ignition			
	Notes:				
7					
	Notes:				
8					
	Notes:				
9					
	Notes:				
10					
	Notes:				

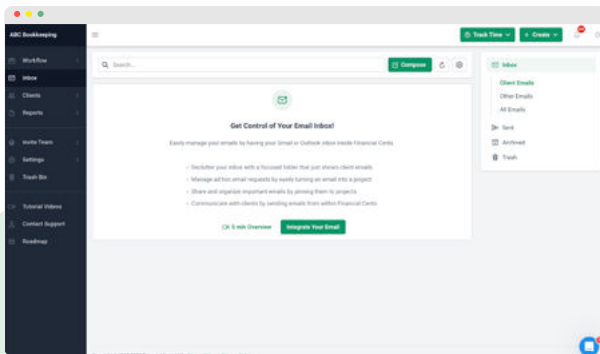
About Financial Cents

Financial Cents is a workflow management software that has all the features you need to get work done in a simple user interface that your team will love and find easy to use.

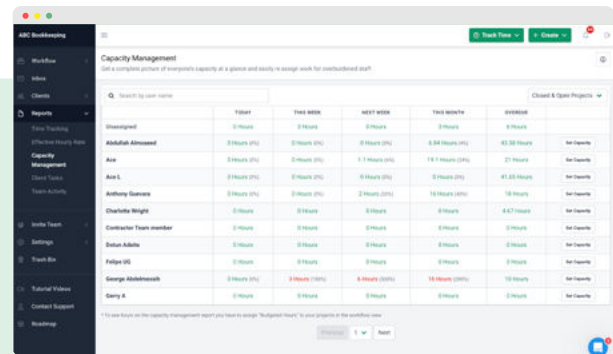
Whether you're just beginning to document your processes or have been doing it for a long time, our latest integration with AI will get you up and running in no time.

Track & assign work, set up recurring tasks, store client information, automate client data collection, and more with Financial Cents.

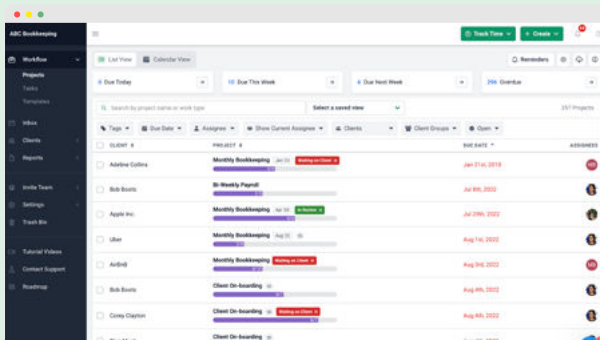
Don't take our word for it, hear what our clients have to say.



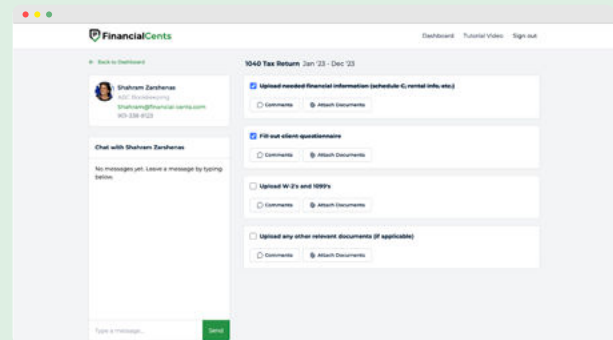
Financial Cents Email Inbox



Financial Cents Capacity Management Report



Financial Cents Workflow Dashboard



Financial Cents Client Portal

Hear from our clients

