

The Blueprint to running a successful Accounting Practice

A centralised, **customer-centric** and **integrated** practice management workspace brings **clarity, direction** and **revenue growth** when combined with the **power of your customer data**.

1

Creating a foundation for decision-making with a single-source of truth



Almost half of all practices **do not** have **complete visibility** of their practice's health.¹

49%

Clarity over your practice's health is critical for the success and predictable revenue growth of your business.

1.63x more likely to exceed revenue targets

The impacts of implementing an effective practice management solution

Greater workflow productivity

Easier to train staff

Workflow clarity that reduces anxiety and stress

Better predictability over revenue and profitability

2

Understand your clients and personalise their experiences with your CRM



Recognising and **defining** your **client personas** can enable your practice to create **personalised and targeted services** that suit your **client's needs at scale** and to **grow your revenue**.

Only **1 in 5** practices have a **completely defined client profile**.¹

22%

Practices with a clearly defined client profile are more likely to exceed revenue targets compared to those without a defined client profile.

1.5x more likely to exceed revenue targets

3

Meet the growing demand for advisory services with business intelligence tools



Business Intelligence tools are **vital for practices** looking to bring **scalable advisory services** to their clients and **avoid** the **unpaid advisory epidemic**.

Almost **9 in 10** practices said their clients expected services beyond compliance and bookkeeping.¹

88%

Be aware of the unpaid advisory epidemic

1 in 4 practices are providing advisory services but are not charging clients for their work and expertise.¹

In some cases, this is driven by an inability to package advisory services.

25%

71% of those practices said that having a BI tool has enabled them to offer advisory services.¹

Business Intelligence tools can enable practices to position their advice as worthy investments with clear deliverables.

¹Your Future Practice report series



Unlock further valuable insights on how to elevate your practice by watching our webinar series, "The Blueprint to running a successful Accounting Practice".

[WATCH THE FULL WEBINAR HERE](#)