



The “No BS” Guide to Improving Workflow At Your Accounting Firm

5 strategies to increase profit,
decrease stress, and
actually have a life



Jetpack
Workflow

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INCREASING YOUR WORKFLOW EFFICIENCY TO INCREASE CAPACITY

Sam started his practice ten years ago. He worked “typical” 80-hour weeks to build his dream firm. He hired a dozen workers spread out between CPA practitioners and administrative staff. His firm grew and referrals came through the door. That’s when the cracks started to form.

Deadlines were missed. Client documents disappeared. Hours increased. Staff was burned out. Clients became upset and left.

But what was even more surprising was the amount of stress this growth would cause for Sam. Growth was supposed to be good.

No longer did running a firm feel cool. It was now causing him to stay awake at night thinking, “Did I miss a deadline?” or “Did I forget that client request?”

His firm, which seemed so simple just six months ago, was out of control.

This is what happens as your firm grows, and you encounter the fortunate problem of workflow management (even though it’s a “fortunate problem”, it doesn’t mean it’s painless to solve!)

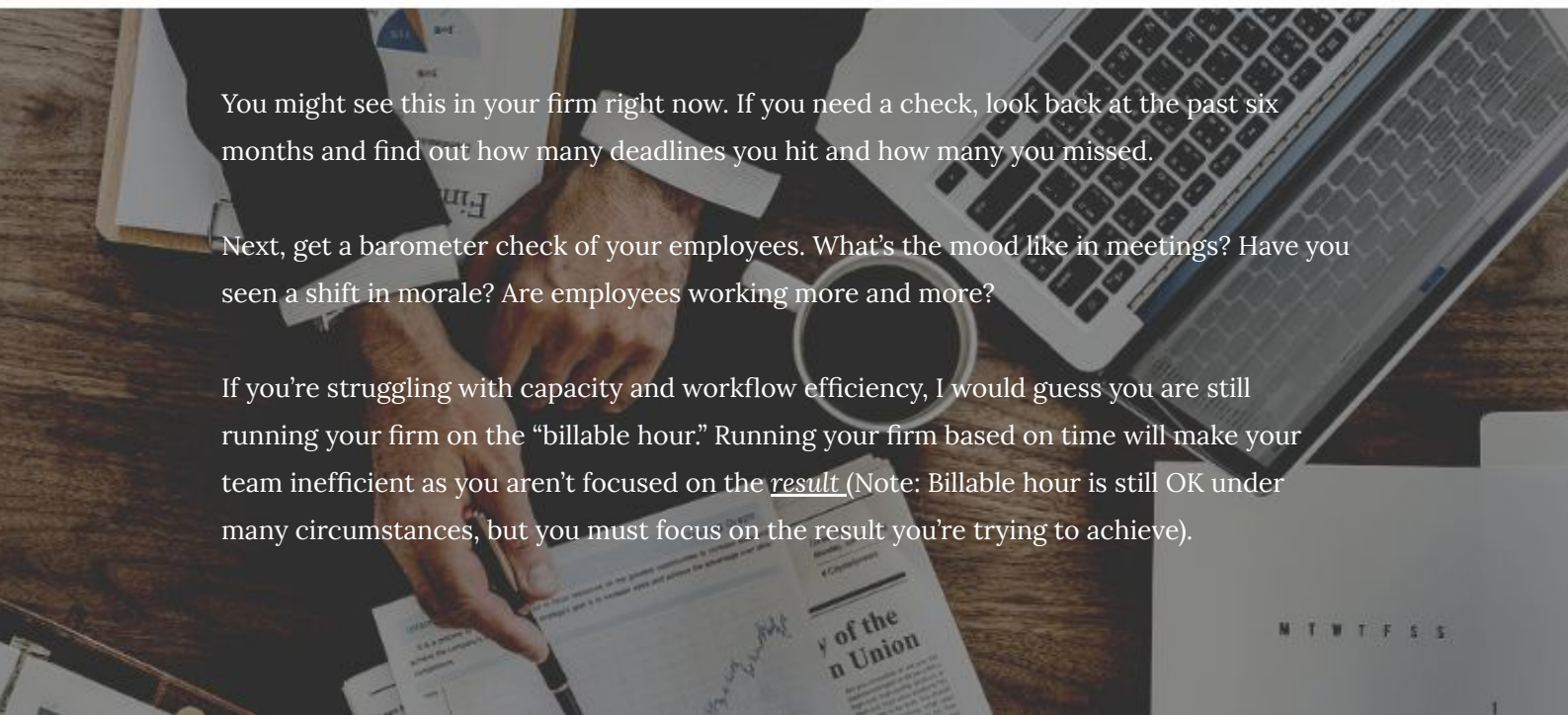
I get it. When you start off, you are simply trying to make things work, so a bit of duct tape here, a quick clean-up there, and you get by. But, if you’re trying to double, triple or multiply the size of your firm, the house of duct tape will fall fast. Capacity will get squeezed, your employees will see increasing hours with little return, and clients will see deadlines come and go.

This is what happens when you don’t have the right workflow systems in place. Capacity gets stretched when it could’ve been avoided.

You might see this in your firm right now. If you need a check, look back at the past six months and find out how many deadlines you hit and how many you missed.

Next, get a barometer check of your employees. What’s the mood like in meetings? Have you seen a shift in morale? Are employees working more and more?

If you’re struggling with capacity and workflow efficiency, I would guess you are still running your firm on the “billable hour.” Running your firm based on time will make your team inefficient as you aren’t focused on the result (Note: Billable hour is still OK under many circumstances, but you must focus on the result you’re trying to achieve).





It's easy to look back and see the mistakes. You might wonder how it got to this point. Sam certainly did.

Many firms end up in this predicament at some point or another. It might be at 12 employees; it might be at 5, 50, or 100. Eventually, there will be a break and the reason is simple. I'll show you with an example:

Have you ever played the game "telephone"? If you remember, one person in the group would have a message that they would whisper in the ear of the person next to them. The listener then whispered to the next person, and so on. At the end, the last person to hear the message would say it out loud. Normally, giggles would break out as the final phrase was silly and significantly different than the original message.

This childhood game happens with the workflow in your firm. Sam taught his process to his first CPA hire. That CPA then trained the next one, but probably tweaked the process a bit to suit her style. Soon, after 10 iterations, none of the CPAs were doing the process the same way.

Suddenly, there are corrections going back and forth and disagreements about how the process was supposed to go. Time is wasted and clients are upset. As new clients come in the door, there aren't enough hours in the day to help them because of these inefficiencies.

How does the owner cope with new clients?

They do the obvious: they hire more and more staff and say, "Look at us, we are growing!" But it's a false celebration; hiring 10 people to do the work of five only sucks up more profit and decreases bonuses, while the owner has the delusion that the problem is solved.

That is, until the next wave of clients come in and capacity is overflowing and more hires are needed. Adding more bodies to a broken system will not solve the problem. It's just duct tape.

This was Sam's problem. I've interviewed thousands of firm owners on my podcast and found that this isn't a unique situation; it's actually fairly common.



But it should still worry you. You might feel a tiny amount of stress right now, but you are in the calm before the storm. If you don't fix this fast, you could have legacy clients packing up and moving on. That's the reality.

Now, look at the opposite end—when you get the right systems in place, you'll suddenly see you have more time and more profits at the end of the year. You will have more time because you will be automating and outsourcing more tasks. You'll pay a small price, but save hundreds of hours.

Trust me, the small fee you pay will be much less than what you pay in salaries, bonuses, and insurance for new and unnecessary CPAs.

You'll have more profits because you are hiring only the right number of people. With all your additional time and efficiency, capacity will open up fast to make room for growth. More profits means more compensation for your current staff, which keeps them on your team. CPA recruiting is a growing, cut-throat industry. Cementing your core team for the future is essential to a budding firm.

You'll also see more revenues. As capacity grows, new clients can come in and fill in the gaps. Thus, it becomes pure profit going into your pocket as you won't have to hire new people every time bundles of clients come in. And even with more clients, you'll have less stress. You won't be waking up worrying about a deadline or if you missed something. Everything gets taken care of because your workflow works.

You will learn what the best in the business do to make workflow run as efficiently as possible. Plus, I'll tell you how to increase capacity without hiring more staff.

Stress down, profits up!





MAKING WORKFLOW WORK

Conceptually, workflow is the high-level overview of how work gets done. For reference, the process you create refers to what to do. When you get a handle on workflow and build a process that services that workflow, efficiency goes up and you're in better shape to expand.

As you build out your workflow, keep in mind that your product is your workflow and the process you use to complete projects. Want to build a more profitable, scalable, referable "product"? Then dig in.

Also keep in mind that a well-functioning workflow system can take the place of a significant amount of admin staff, so putting the foundation in place can literally add thousands of dollars per person, per month to your firm.

Jeff Boreshowa, the innovator behind DreamPractice, stresses that you must have an

"assembly line" process. Everything goes through the same way and comes out the same way.

"If you don't have a system in place, how can you trust your staff?" Jeff asks.

Starting at the Top

Problems occur because roles in the firm get mixed up, so let's start with a breakdown the roles in your firm.



Owners / Partners:

Normally, partners have worked in the industry for many years and are experts in their field. Hourly rates are normally over \$200. Generally, a partner should be focusing on three core areas:

- Business development
- High-level, high ROI client work
- Team-building

According to Rob Nixon, international speaker, CEO of Panalitix and CPA advisor, it should be broken down like this:



MAKING WORKFLOW WORK

60% Business development
30% Client work
10% Team-building

Obviously, this is going to be balanced differently for different firms. A partner heading up Compliance and Audit will probably swing more time to client work, rather than business development. That's going to happen. The point is, owners/partners are doing high ROI activities. Everything else should be delegated to the next level down.



Managers

Managers are responsible for correctly implementing the systems passed down from the partners. Managers must discover the small cracks before they become big ones and approach owners and partners to alert.

Managers focus on:

- Client work
- Onboarding clients efficiently
- Training the system
- Team-building

Managers will normally bill between \$125–\$250 per hour. The majority of their time should be spent onboarding clients correctly, completing client work, and making sure the system runs smoothly.

Client work should be more of a review and not preparation. Their main objective, contrary to popular belief, is not to get client work done, but to make sure the system is moving and capacity is evenly spread out.

When a manager gets too involved in the weeds, they lose sight of their main objective and that's when the cracks start. Like partners, managers should be delegating the bulk of client work to the next level down.



MAKING WORKFLOW WORK



Practitioners:

These are the foot soldiers. The ones taking a box of client receipts and turning it into a tax return. Much of the time, they will also be the voice of the firm for the smaller clients—remember, partners will be doing high-level work with “valuable” clients.

Most new clients should go from the onboarding manager directly into the lap of a practitioner.

A practitioner focuses on:

- Quality client work preparation
- Touchpoints with clients

Touchpoints are quick check-ins with clients to make sure your firm is top of mind, but also to plan ahead for what’s going on in a client’s business. Everything else is delegated down.

Practitioners normally charge \$60–\$120 per hour.



Administrative Staff:

Administrative staff typically don’t charge for their time. They handle all the paperwork and make sure everything gets sent out to clients.

Their duties include:

- Handling paperwork
- Sending out completed work and information to clients
- Scanning
- Scheduling
- Answering phones

Administrative staff take care of the administrative work so that practitioners, managers, and partners can focus on their billable hours’ work.



MAKING WORKFLOW WORK

Can you see where there might be issues?

Notice that at the top three positions, staff are not involved in any administrative tasks. None of these levels should be spending non-billable time doing non-revenue producing tasks. Partners should not be scanning in documents or sorting through client paperwork. Managers shouldn't be running around trying to get all the pieces together for a project.

Hiring more administrative staff is usually what many firms don't do. They pile all the work on a few receptionists and the rest gets pushed up to the practitioners.

An admin salary is normally around \$40,000. A CPA's

salary starts at \$50,000 and goes up from there, so you can see that it makes much more sense, not just for the workflow, but for salaries' sake, to prefer hiring administrative staff than CPAs to do administrative work.

If you save a CPA just 200 hours a year from administrative tasks, at a base rate of \$100 per hour, that's \$20,000 in additional revenues into the firm. If you have 5 CPAs, now you've added \$100,000 in revenue. So, hiring an admin for \$40,000 makes much more sense.

Now, we know where problems can occur, let's find out where you need to focus your attention.



SETTING THE BASELINE

*What you can't measure,
you can't manage*

*—Peter Drucker, renowned
author and businessman*



When I interview top practitioners, I ask them which metrics they track to run a successful firm. Here's what I hear all the time:

Turnaround time on work

Capacity and utilization

Profit per client

In other words, successful companies know exactly how fast and efficiently they are completing work, if anyone is under- or over-utilized, and how healthy their margins are.

While workflow intertwines through all metrics, let's going to focus on turnaround time and capacity.

Turnaround Time

Turnaround time helps you understand the internal deadline for the job so you can properly schedule team members, and therefore drive a profitable job to completion.

For those not familiar with turnaround time, simply put, it's answering the question, "How many days should this take?"

Decreasing turnaround time gives your clients the best experience possible. You might not believe your clients care when you give them their work, but they do value it. Think back to this: when the pressure was on to get returns and work out the door because of the tax deadline, did it get





SETTING THE BASELINE

done? Most likely, yes.

You would be surprised how efficient CPAs become when there is a deadline knocking. It actually has a name: Parkinson's Law.

What it means is that time expands to the extent work needs to be done. Meaning, if you set a realistic deadline for something to be done, as long as the focus is on that task, it will get done no matter how overwhelming it seems. Your brain suddenly kicks into efficiency mode.

Squabbles about minor issues are tossed aside and bigger issues aren't a barrier anymore. Remember that one return you had to get out by April 15th? On April 10th, it seemed hopeless, but by April 11th, you threw caution to the wind, got the client on the phone, didn't take any excuses, got the documents you needed, and pumped out the return.

That's Parkinson's Law.

Now, compare that to what is done on a regular basis:

1. You get a client file. It sits for a bit.
2. A team member picks it up. There's missing information, so an email is shot off to the client.
3. Two weeks later, no word. Another email.
4. The CPA does a bit more work on the file as one document comes in, but they are still waiting on more.

You can see where this is going.

Suddenly, two months later, the work is about 75% done and when the client calls, disgruntled. You quickly sweep the problems aside and finish it.

This is reactive workflow. It's not good; it's inefficient and makes clients frustrated.

What you need to do is, with each project that comes in, set a deadline





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right away. Thirty days from now, the work will be complete. All documents are received upfront and you get it to the client on Day 20. That's great service.

[SHOW 1040 TURNAROUND PROCESS WORKSHEET]

Now, to get Parkinson's Law working at its maximum potential, you need to set the right processes in place to open up capacity and utilization.

Capacity and Utilization

When you open up capacity for your team to take on more work, you can bring in new clients while still nurturing your legacy clients. The former leads to more revenue without hiring more people. The latter leads to more referrals.

Dustin Hostetler, Director of Six Sigma Consulting and Boomer Consulting, breaks out teams to discuss processes.

"Just because a process is written down on paper doesn't mean it's reality."

Here's how Dustin would get the system in motion: start with workflow visualization. To get started, he recommends getting a whiteboard or post-it notes together. Create a workflow map of your top three service categories.

Start at a 10,000-foot level and with the main steps and map them out on the whiteboard. This starts with, "Return goes from CPA to manager, to partner, to admin."

Those are the basics. Now, dig deeper.





SETTING THE BASELINE

Break each step into more detailed sub-steps. This is when you want each person involved in the step to sit down together, without the boss around, and outline their process. What you'll notice is they don't all have the same steps or processes. Now you know you have a problem. Let each member go over the issues they find. Nothing is fixed until every step and every member has the same process.

Damien Greathead, VP of Receipt Bank, sees these issues in firms every day. Often, practitioners are running around from office to office trying to get answers. But clients don't see the craziness, all they see is that their project isn't done on time.

He recommends, if you need to know where the bottlenecks are...

*Ask the admin team.
Administrative staff ALWAYS
know where the trouble spots
are.*

While you discuss all of this with your team, the questions you should be asking are:

1. How is the client experiencing our workflow? Where are they confused/angry/disappointed?
2. Where is my team stuck?
3. What is the most time consuming or frustrating part of this workflow?
4. Is there any part of the workflow where we can lower accounts receivable and get paid faster?

Map all these questions out through each step. The important piece to remember is, just because it is written down as part of the process does not mean it is actually happening that way! You will be able to figure this out based on the answers team members give for the above questions.





SETTING THE BASELINE

After talking over these points, ask (in this order):

1. What can we remove to save us time?
2. What processes do we need to update or clarify so the entire team has a uniform process?
3. Do we need to add any new steps? (This should always be last.)

Getting these questions answered is critical for increasing turnaround time and opening up capacity.

Going hand-in-hand with capacity is utilization. Utilization covers how much of the team's time is spent on client-facing, income-generating activities. As I discussed at the beginning, you have certain duties depending on your position. Anything outside of those duties is inefficient and most likely not profitable for the firm.

If you use the billable hour as your metric, you can see right away the number of "unbilled" and "non-billable hours." Those should be as low as possible.

Do the quick math. Take all the non-billable hours from all your team members and multiply by their hourly rate and see how much revenue is being left behind.

Getting Started with Utilizing Your Time Efficiently

For one week, map, in detail, what you are doing with your time. Include every minute not spent working and every minute spent scrambling around looking for a document. Have your entire team do this.

Take a week to compare each member's schedule. Make sure your team feels comfortable putting down everything, rather than embellishing. It's





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important to explain, upfront, that there are no repercussions in any way, and that your goal is to help them make more money and work with better clients, not to assess their quality or usefulness. If you position it this way, they are much less likely to see it as a “Big Brother” project.

Dissect each member’s time and find where the problem spots are:

Is there too much down time?

Is the team working too many hours?

Are there similarities in problems they face?

Those are just a sample of the questions you could and should ask.

Especially as an owner/partner in a firm, this step is critical. Your time is so incredibly valuable and you must find where you can cut out unproductive time. You will be surprised how much low-value time you are spending.

As we go along I’ll give you some tools and tricks to start saving more time.





ONBOARDING CLIENTS CORRECTLY

Boosting efficiency is easiest to start with new clients. The absolute worst thing you can do is bring clients in through the same broken systems.

Stacy Kildal, founder of StacyK Academy, which helps bookkeepers grow their practice, found that once she instituted the right onboarding process, she was able to cut her client list down. Now, she has a waiting list. This was due to setting the right expectations and being efficient with putting the systems in place. Clients appreciate it and are willing to pay more.

Typically, managers and, at times, partners should do the initial onboarding process. Make sure you bring in the CPA who will handle the bulk of the workload so they can be up to speed as well.

To be effective at onboarding clients, you need to go in with a game plan and the confidence to have control of the discussion. Upfront, you'll want to lay out:

- Expectations for engagement
- What the client values
- What they can expect from you

This runs parallel with how you go through a sales appointment. When you set the expectations for the call, prospects are more willing to walk to the beat of your drum because there is a plan in place.

In sales, the one who maintains control normally ends up getting what they want. Onboarding is the same. Yes, you already closed the client, but now you must further sell your process.

Right away, you should set the expectations for how they can become a good client. In the grand scheme of things, you shouldn't bring on clients that aren't going to go along with you; you'll lose profits and time.

You should set the expectations that:

- When the firm requests documents, the client will send those documents within one week, or whichever duration you are comfortable with.
- The firm is not a bean-counter, but a partner; one that helps grow their business.
- Team members are to be treated with respect at all times.
- If, at any time, one side doesn't feel they are receiving the right attention, schedule a call to address concerns.

These are just examples of the expectations you can set. You need to figure out who might be a great client for you and your team. We will touch more on this later, but it's important, if you have a new client coming in today, to make sure you are setting the right expectations.





ONBOARDING CLIENTS CORRECTLY

Next, you need to listen to what your client values. Some clients value punctuality, while others value regular phone calls. Each client is as similar as they are different, so knowing them will help you serve them better.

These are the various touchpoints your CPAs will be making note of during the onboarding process: to make sure they over-deliver and get work early if the client values punctuality, to send quick emails each week if they prefer constant communication. As much as you see similarities between clients because they are the same industry, there will be small differences that your clients will appreciate you taking care of.

The last part of setting up the right onboarding process is letting the client know what they can expect. After hearing what a client values, you want to make sure you parrot back to them what they want. It shows you are listening and being attentive to their needs.

Most likely, your client picked your firm because you have a unique service or value. If you're local and you make sure your clients are your friends, tell the new

client this. If you're known for the extra value in helpful information, let them know they can expect that as well.

These are the sprinkles on the ice cream.

Remember, a new client is just as nervous as you are. They want to make sure they entrusted their financial future in the right hands. Any extra benefits help them feel more at ease in every way.

Stacy Kildal has her own method of onboarding that you can take as a great example. As an owner of a bookkeeping firm, she starts with a "Quick Review" of a client's books. She charges them right away for this so they actually value it, because, as you should know, we value what we pay for. By going through this upfront with a client, she's eliminated clients who weren't a good fit and who she knew would suck time out of her firm later.

For her next step, she prepares a quick report of what needs to be cleaned up. Since she's added this value, the client will most likely just hand over the work to her. She then makes sure she gets all the documentation to complete the work upfront. This saves time by eliminating going back and forth with the client.

The best way to approach onboarding clients is not to start with, "Let's get the clock moving so we can bill them." Rather, focus on ensuring they know what to expect and they understand the value you offer. It's a partnership, but it's also your business. Make sure the client is willing to work with you as well.





ONBOARDING CLIENTS CORRECTLY

Should I Trim My Client Base?

If you onboard clients correctly, find where the bottlenecks are in the processes, and open up capacity for your team, you should be able to grow.

Here's a secret: when you get the systems working and you're providing value to your client, they will pay more. When they pay more, you will make more revenue per client. When you onboard a client correctly, then have the right processes to provide the most value to them, your firm is now invaluable to your client.

Putting in a new process isn't simple. It takes buy-ins, killing old habits, and recognition from clients. All of this can take time and frustration.

Here's what I recommend and what I've learned from talking to hundreds of firm owners: sometimes, you will need to cut a client loose for the good of the team and the process. Obviously, each client holds a certain "revenue spot" on the firm chart, but I'm talking about long-term growth and prospects. In a service business, it can be difficult to see where the profit gets lost. I'm here to tell you, a bad client costs

much more in time and profits than you think. Cut a client loose if they don't conform with your new processes.

Chad Davis, a Partner at LiveCA, uses an internal metric called a "mushy point." Basically, each client is weighed not just on the revenue brought into the firm but also on how each team member enjoys working with them.

There will always be new clients out there, but building a new team because of high employee turnover is much harder. Ensuring your employees are satisfied with the clients they work for makes it easier to keep your staff and find the clients that suit your company. At LiveCA, they turn the idea into an equation, which gives the entire firm an idea of how valuable each client is.

I'm not saying you need to have "mushy points," but weighing all the things a client brings to the table isn't a bad idea. Remember, one bad client could chase a team member off.

Ingrid Edstrom, founder of Polymath, realized 30% of her client base was taking up most of her time. Most wanted a bunch of discounts and freebies, plus they were just not pleasant to work with.

One evening, she emailed the 30% telling them she was going in a different direction with her firm and referred them all to other firms. She made a tough decision to leave those clients and save her profits and team. Less than a year later, she doubled her business.

She took the step back to make sure her home base was good, then took three steps forward. Now, her firm continues to grow. That's the difference between top firms and firms that putter along.



TOOLS & TRICKS

By now, you should have assessed where there are hiccups in your process. Is technology a problem?

If you are still using outdated software, it's time to invest. A major downfall of more traditional firms is their use of paper. This isn't a green initiative, but a productivity one. Find a solution to keep everything digital and in a cloud server.

There are too many firms with file rooms filled with client documents, or a room holding their personal server. Those standards are over 10 years old and technology has changed quite a lot in the past decade. Now, there are multiple paperless options you can use to increase productivity and reduce physical space.

Tim Shortsleeve, Partner at TYS LLP and AICPA speaker, gave each of his employees a second monitor and saw a massive boost in productivity.

Another big push is toward cloud accounting and software. QuickBooks Online and Xero are great examples of where client books could be. When you can get every new client online, everything runs smoother because there's just one process to follow.

A friend of mine came from a firm where every client was different. They wanted to "cater to the client's wants." Yes, you should do this, but not at the expense of profit and increased frustration. At his firm, one client was on QB Online, another on QB 2015, yet another QB 2013, and even one on Peachtree accounting.

You can't run a firm like this. If it's a cost issue for your client, it might be worth it for you to pay for them to upgrade, ensuring all your clients are on the same system. My friend would waste countless hours tracking down other team members asking "Why can't I do this in QB 2010 but I can in QB 2014, what do I do?"

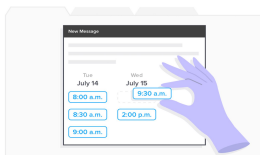
You can't grow a firm like that, so make it a demand:

*all new clients will
be on cloud
accounting.*



TOOLS & TRICKS

Since we're on the topic of technology, here are some recommended apps that save you non-billable and unproductive time. I use these myself and can't tell you how much time they've saved me.



Calendly: This app integrates your calendar and lets you send a personalized link to anyone to schedule a time with you. It saves the regular “What time works for you?” emails.



Team Hively: It's an automated feedback tool sent to your clients. The information you gather is priceless and helps you strengthen your processes. Plus, it's all automated.

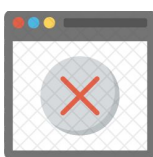


Flux: This is more of an “underground” hack. Flux dims the light on your computer and removes the blue light. This keeps your eyes from getting tired, especially when working late.



FollowUp.cc

Followup.cc: This one is absolutely essential for retrieving client documents. It allows you to simply set a template and let it automatically send emails to clients to remind them to send documents. It saves you hours per month following up on missing information.



Temporary site blockers: There are many to choose from. I've used rescuetime.com to keep employees focused. It doesn't need to be something employees are scared of, but more of an internal way to measure how much time is wasted by distractions. Let team members use it privately so they can adjust their habits on their own.



CONCLUSION

You might have been tempted to skip this over and get to the more “juicy” pieces, like getting new clients and referrals, but you’ll be glad you didn’t get too far ahead of yourself. Now, you know that you could get as many clients as you want, but if you don’t build out the right systems, you’ll experience these issues:

Clients will be unhappy and some will leave.

You will be working day and night.

Your team won’t stay together, so you’ll waste precious time hiring and training.

These are just facts. In football, games are won in the trenches. The quarterback, running backs, and wide receivers get the glory, but if you don’t take care of the offensive line, it won’t matter.

You need the “less sexy” things taken care of first before you go out and find new clients. You’ll feel more comfortable bringing in bigger clients, plus you won’t be waking up in the middle of the night thinking “Did I miss something?”

Have each level of your firm follow these pieces of advice: partners, stop spending time on admin tasks; managers, stop getting lost in the weeds and keep the system alive; practitioners, trust the process; and administrative staff, take as much as you can off the plates of the partners.

This is how firms grow.

P.S. For Partners

Partners are the reason new systems don’t get implemented. They might have gotten used to 20 years of doing it their way and refuse to change. Here is my plea to you: I understand you’re very good at what you do. You make a living this way because you enjoy it and it pays well. A new system will have you spend more time out with your family and get you more



dividends at year-end.

Doing it your own way only makes it harder for everyone else and for the younger team members who look up to you for guidance.

Changing habits is tough. It's not because you can't do your job, it's just that times and technology change. There are better ways. You're supposed to be a leader in the firm and are responsible for its growth. Put pride aside and work together.

Damien Greathead has a hard and fast rule: if a partner is resistant to change that grows the firm, they have to go...

ACTION STEPS

1. Define the roles of everyone in the firm. What will each person be doing?
2. Ask yourself, how can we implement a standard turnaround time for projects to take advantage of Parkinson's Law?
3. Sit down with your team and go through the processes. Where are the trouble spots?
4. Map each person's time. Where are there openings and where are the bottlenecks?
5. Re-examine the onboarding process for a new client. Are we bringing in the right clients and finding a way to cut out the bad?
6. Look at your own client base. Are there clients who aren't contributing to our firm or hurting us?



INTERVIEWS TO GO DEEPER

1. [Build a Better Workflow](#) - with Jeff Borcshowa
2. [Landing the Best Clients](#) - with Stacy Kildal
3. [Ditch Timesheets and Grow Quickly](#) - with Tim Shortsleeve
4. [Mastering Workflow for Firms](#) - with Damien Greathead
5. [Boost your Firm Profitability](#) - with Rob Nixon
6. [Apply Lean Six Sigma to Workflow](#) - with Dustin Hostetler
7. [Double Revenues by Cutting 30% of Clients](#) - with Ingrid Edstrom
8. [Onboard New Clients](#) - with Chad Davis

RECOMMENDATIONS

I've spent years building software to solve these exact issues. My company, Jetpack Workflow, is used around the world to prevent work from falling through the cracks and to ensure you keep your clients happy.

If this struck a chord with you, it probably means you have holes in your workflow processes. I invite you to try a 14-day free trial of Jetpack. No obligation required.

Too many firms live on outdated software and it ruins efficiency and limits capacity. You're reading this book to grow your firm, and your workflow processes act as your foundation. It's the most important change you can make.

You can also email me: david@jetpackworkflow.com

**Are you ready to start making your workflow work?
Check out**

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