Practice makes perfect

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Best Practice	
Internal for practice	**Shared with client**
Deadline management. An easy way to monitor upcoming deadlines by client and accountant, so work can be carried out proactively, eliminating last-minute panics and ensuring that nothing slips through the cracks.	*Receipt and expenses management*. A "digital shoebox" in which clients can store and process receipts in real time. This means it is simple to prepare returns in an MTD-compliant way.
Task management. An "at-a-glance" view that shows outstanding and completed tasks by client and responsible accountant.	*Invoice management*. Clients can issue invoices, reminders and receipts quickly, and the accountant has access to the latest information for return preparation.
Document storage and sharing. An online filing system that makes it easy to find, check and send documents with a full audit trail.	*Electronic signature*. This allows clients and accountants to process documents efficiently.
Timesheets. These show time spent and value delivered for each client, giving evidence to justify price increases and evaluate profitability.	*Reporting*. These keep both sides up to date while ensuring the firm is running efficiently.
Staff management. These show utilisation, capacity and client distribution, to facilitate effective delegation within the firm.	

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