

Practice Opportunity Map

Six places to look for useful improvements across an accountancy practice. Start with evidence, use existing software where it fits, and keep professional judgement with your team.

Area / symptom	What could help	Evidence and first check
Client onboarding The same client details are entered more than once, or nobody can see what is still missing.	Collect information once, validate required fields and route it into the right client record and checklist. Review: Keep identity checks, acceptance decisions and unusual cases with a named person.	Follow three recent onboardings. Note repeated fields, missing items, ownership and exceptions. Check forms, templates and integrations in your current practice software before commissioning a new portal.
Information gathering Requests and replies are spread across email, while the team keeps reconstructing what has arrived.	Keep an itemised request list against the job, link incoming information and draft targeted reminders. Review: Review recipients and sensitive attachments. A reply arriving does not prove an item is complete.	Sample three jobs. Compare requested, received and accepted items and count duplicate requests. Try request lists, portal uploads and reminder settings in software you already use.
Workflow and review Jobs wait between people, and progress depends on asking around.	Make ownership, blockers and readiness visible, then automate predictable routing. Review: A status change must not bypass technical review, approval or filing controls.	Trace three jobs from preparation to completion. Separate active work from time waiting. Configure stages, owners and required fields in the current workflow tool first.
Practice knowledge People repeatedly ask the same internal questions or search through conflicting guidance.	Create a maintained source of approved procedures, with search or grounded AI assistance where useful. Review: Show sources and dates. Restrict access, allow “I do not know” and retain professional judgement.	Collect repeated internal questions for a week. Identify approved sources and out-of-date answers. Improve ownership, versioning and search in your existing document system before adding AI.
Management visibility The weekly picture takes manual spreadsheet work, and figures differ between systems.	Agree metric definitions and connect reliable operational data into a useful management view. Review: Make freshness and missing data visible. Time released is not automatically cash saved.	List decisions made in the weekly meeting, reports used, data owners and reconciliation effort. Check native dashboards and exports before building another reporting system.
Meetings and follow-through Booking takes several emails, then notes and commitments need to be retyped into the client record.	Offer available slots, capture an agreed meeting record, and prepare notes, actions and relevant profile updates for review. Review: Agree recording with participants. Review notes before sharing and confirm actions, owners, due dates and profile changes before saving.	Trace three meetings from booking to completed actions. Check diary effort, note preparation, missed commitments and duplicate entry. Check calendar booking, meeting transcription and CRM integrations already included in your software.

Choose: a frequent problem, a named owner, a baseline and a small trial. Time released is not automatically a cash saving. A general map is not a diagnosis.

Want help prioritising? The £950 Practice Opportunity Review covers up to three agreed areas.

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