

# Producing financial statements: 4 essential time management tips



## Presenters



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Content Marketing  
Executive



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Sales  
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Questions



Handouts



Recording



Email

# Today we'll be exploring

How to save time with automation using Surf Accounts Production

4 essential time management tips you can implement

5 ways you can use the time you've saved effectively

See the software in action



# Why is measuring your time important?

- Meeting your deadlines
- Measuring billing hours
- Growing your business
- Improving your service





## Today's goal:

To provide you with effective methods and tools you can use to improve your time management



**Tip #1:**

**Plan out your schedule  
and set priorities**

## Creating a schedule



- Pick a consistent time and date
- Keep track of everything you need to do
- Estimate the time each task will take you and set priorities



# What can you use to make a schedule?



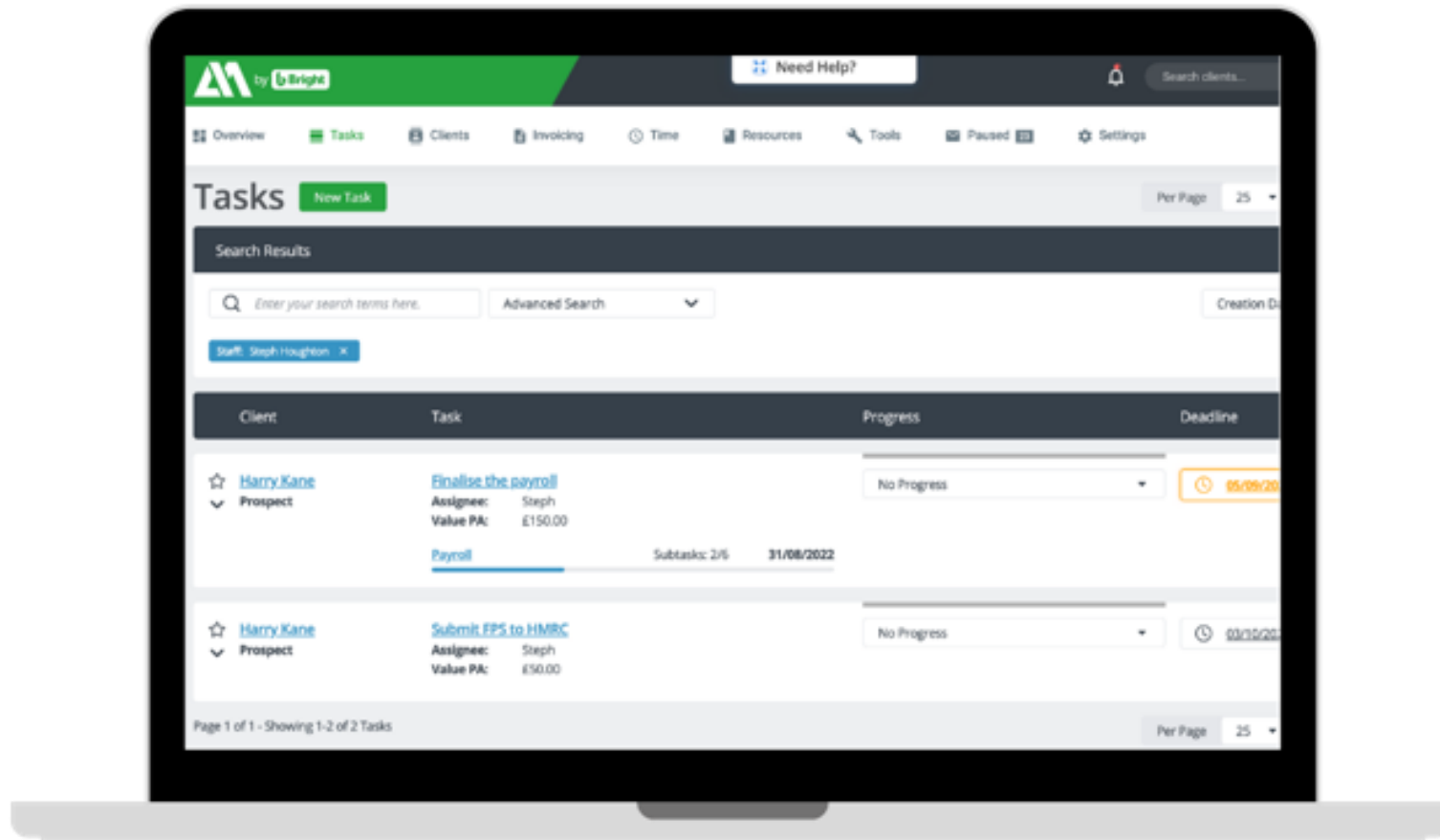
Google  
Calendar



Microsoft Outlook  
Calendar



# Have you ever considered practice management software?



Tip #2:

Minimise interruptions

# How can you manage interruptions?

Schedule communication times

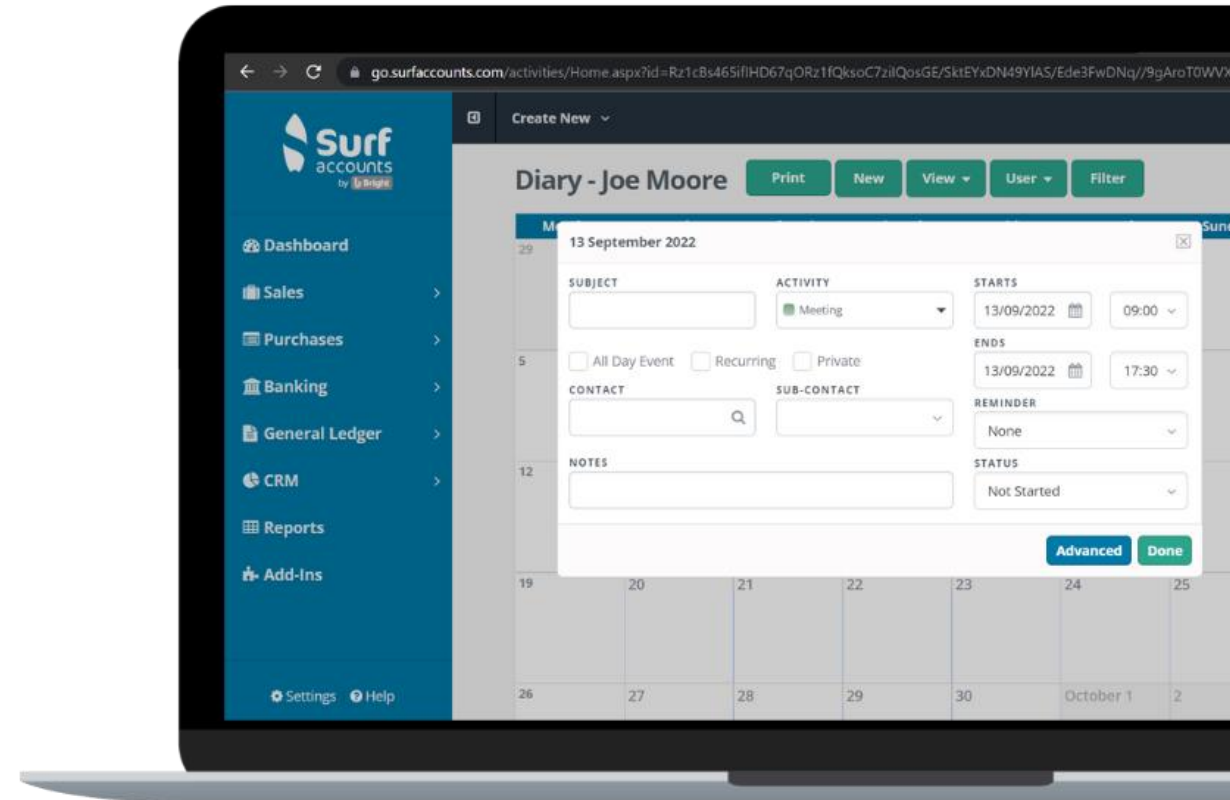
Utilise communication channels

Provide greater access to clients



# Schedule communication times

- Set aside dedicated times in your week to deal with requests which normally interrupt you
- Your clients must be aware of your availability
- Make sure to let them know early on



## Communication channels

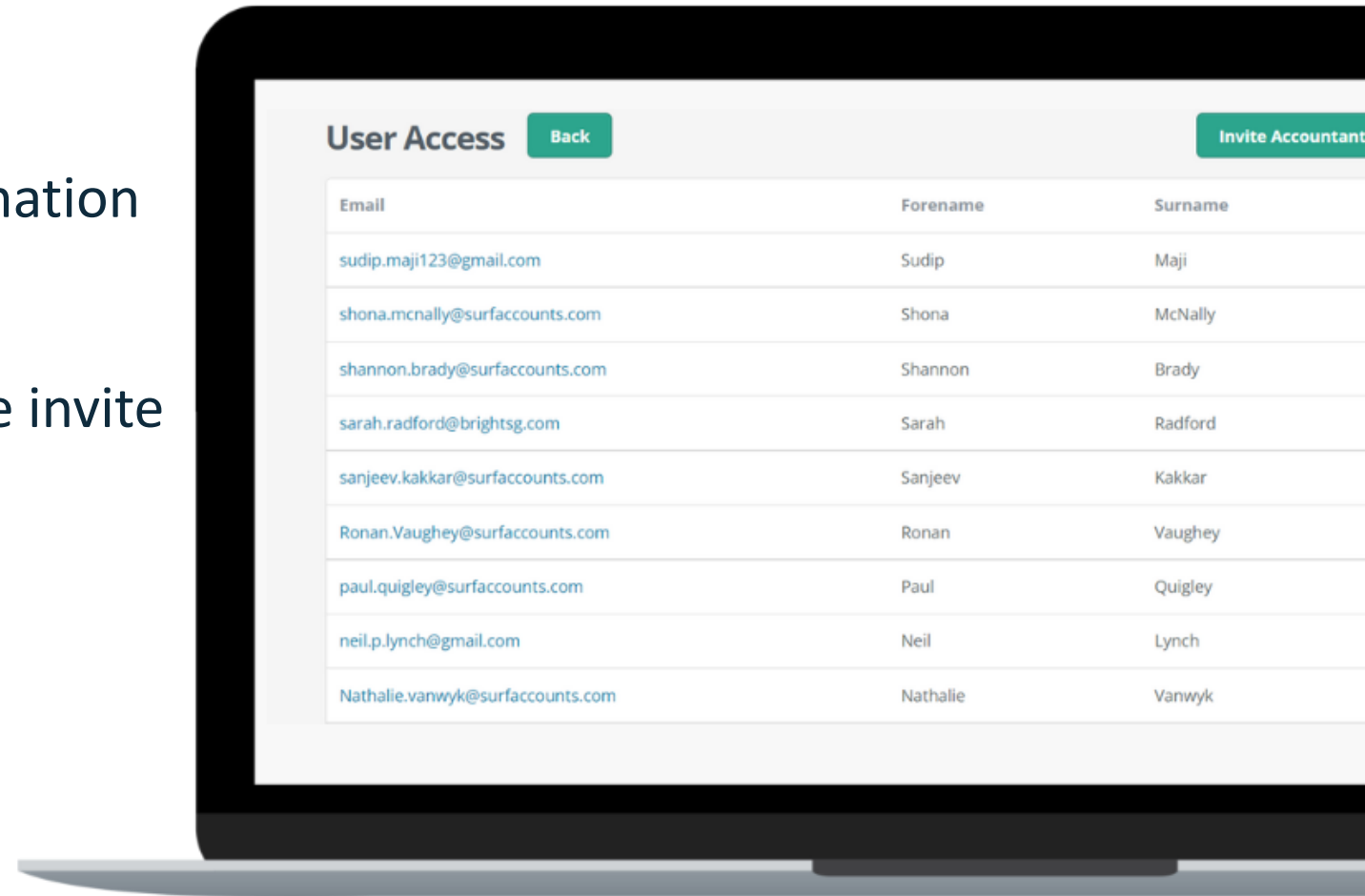
- Narrow the number of channels which you can be reached on
- Make it easier to find all your queries, when you want to deal with them
- Consider software which allows you to show your availability, such as Microsoft Teams





# Providing greater access to data

- Let your clients access key figures without having to contact you
- Let your clients access their information without interrupting you
- Provide access by sending a simple invite



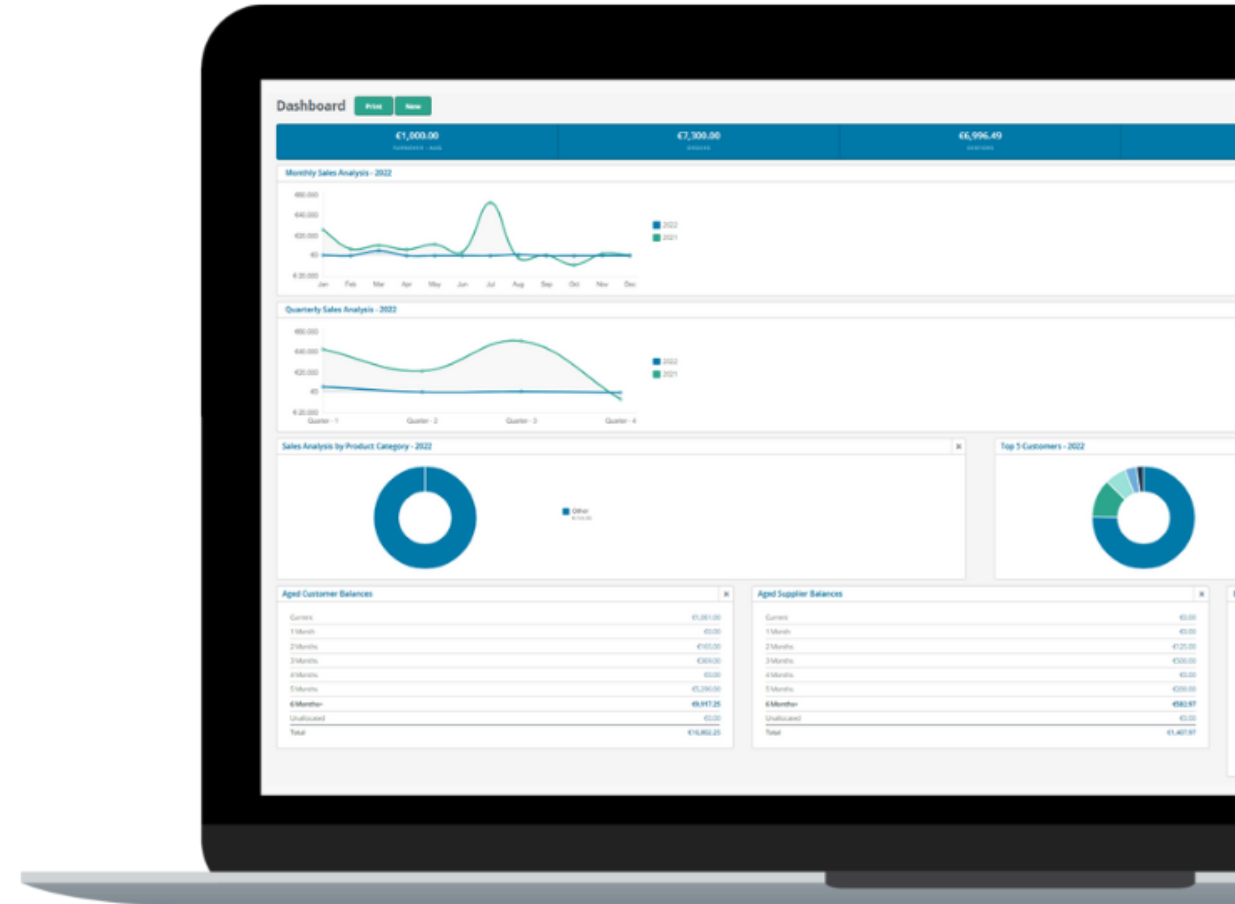
# Dashboards:

## Surf's dashboard will let your clients:

See all the key figures of their business

Determine their top customers

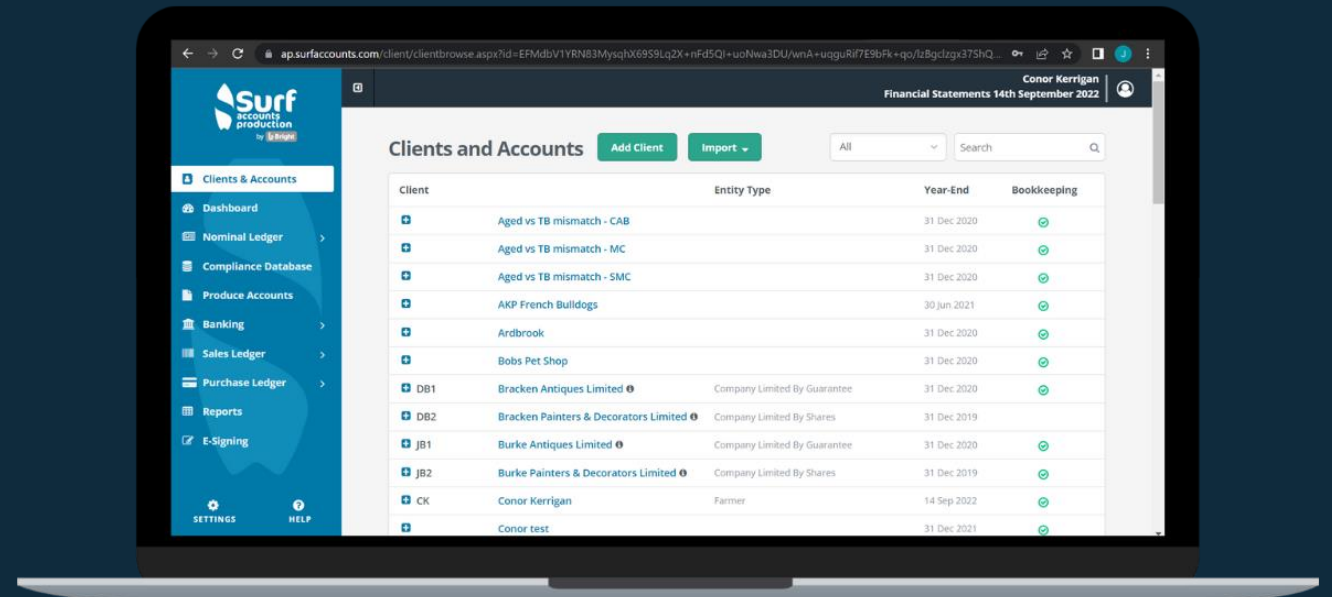
Run business reports by themselves



Tip #3:

Automate processes

# Get the most out of accounting software



# What are the best ways to use automation?

Capitalise upon software integrations

Utilise new technologies

Streamline the creation of financial statements



# Capitalise upon software integrations

- Here's some great ways to automate everyday accounting processes





# Our bookkeeping extension

## More than just an integration

- Conduct all your bookkeeping and year-end work from the same platform
- Add to your service offering
- Gain a new stream of revenue



 Clients & Accounts

 Dashboard

 Nominal Ledger >

 Compliance Database


 Produce Accounts

 Banking >

 Sales Ledger >

 Purchase Ledger >

 Reports

 E-Signing

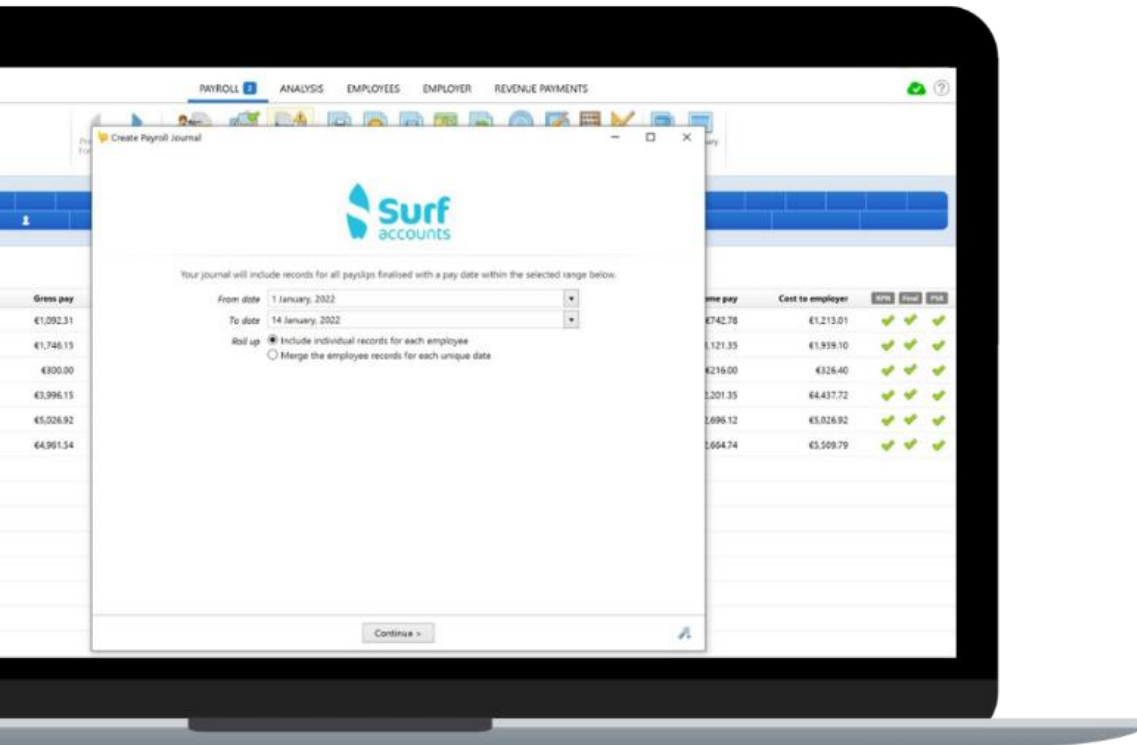
## API integrations

- These ensure the systems you use can communicate with one another seamlessly
- They transfer data from one package to the other, with no errors



# Surf's integration with BrightPay

## Transfer payroll journals directly into Surf



No manual transcription

No exporting/importing CSV files

No time spent fixing errors

# Surf's integration with Dext Prepare

## Send documents directly into Surf

Use the **Dext Prepare app** or **upload PDFs**

**Cloud storage**

**Reduce the time** you spend sorting through receipts

No time spent **fixing errors**



# Utilise new technologies

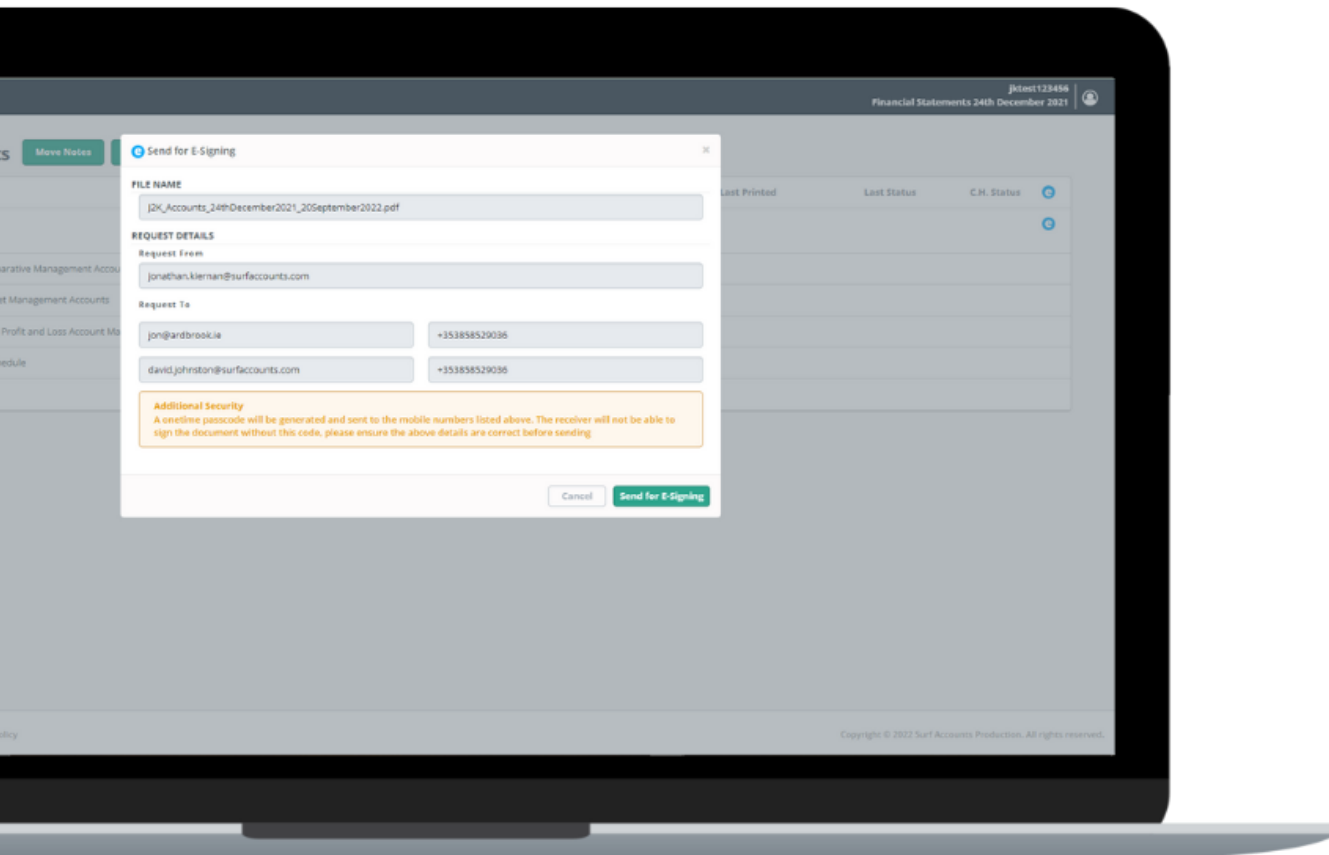
## Electronic signatures

- Get your documents signed digitally
- Spend less time printing documents, meeting clients and organising couriers



# Electronic signatures

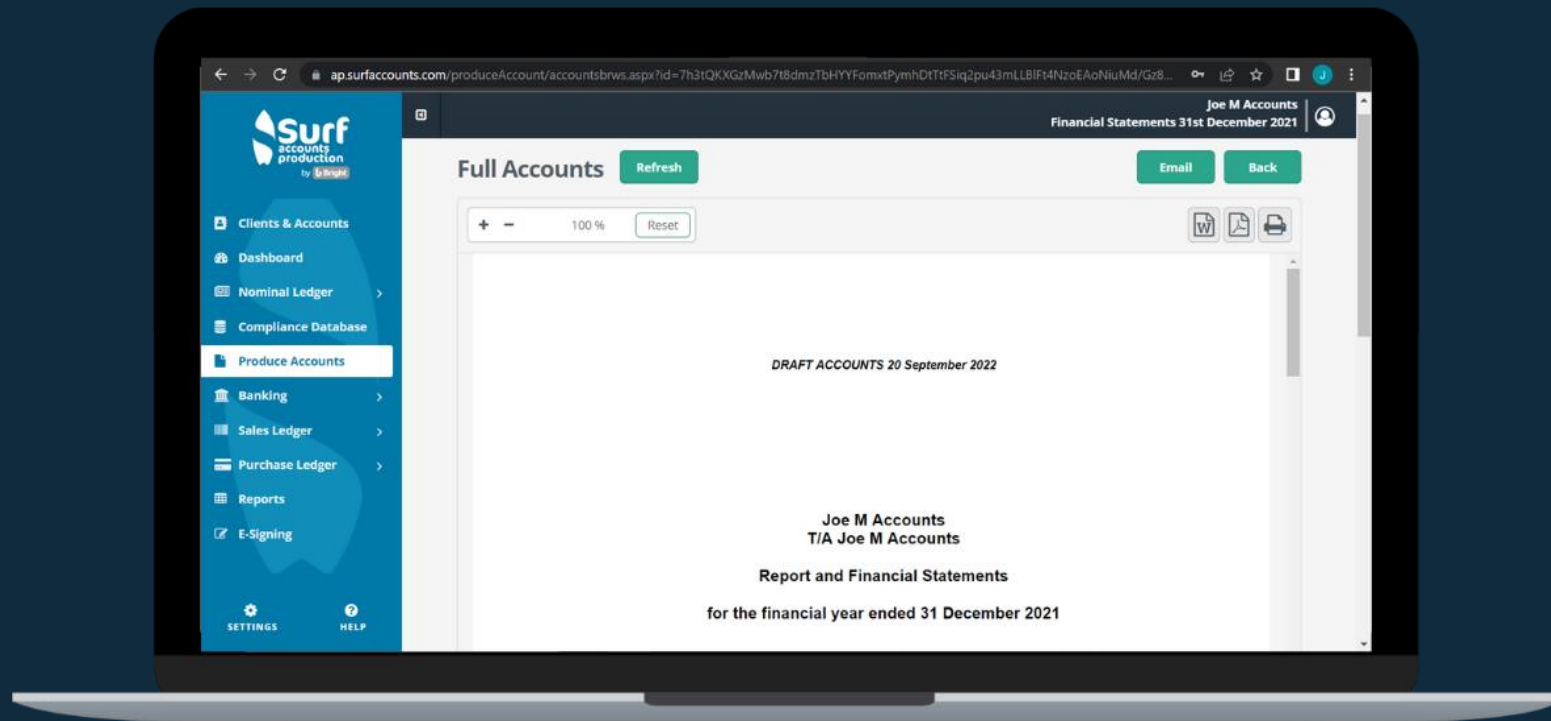
## Get your documents signed electronically



- Select the document
- Choose the recipient
- Press send
- Download the fully signed version



# Streamline the creation of financial statements



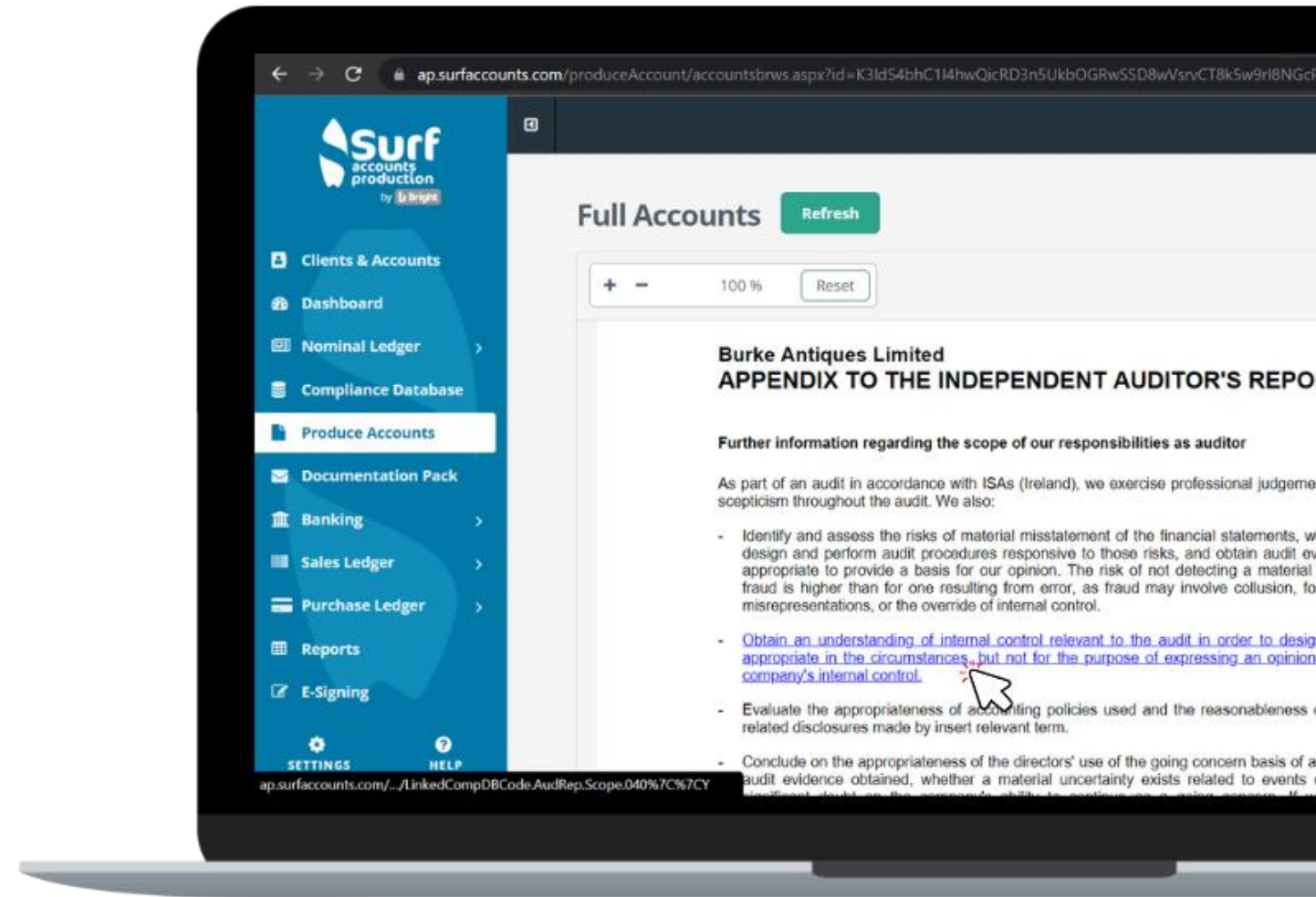
# Save time on the cloud

- Work from any device or location
- Collaborate with colleagues or clients
- Allow multiple users to work on the same accounts

# Surf Accounts Production

## Unique features:

- Cloud based
- Automatic compliance updates
- 9 entity types
- The ability to instantly edit financial statements
- Electronic signatures



Tip #4:

Streamline compliance  
updates

# How can you stay updated and not waste time?

Here's some quick ways:

- Use software with automatic updates
- Follow industry leaders
- Subscribe to trusted sources



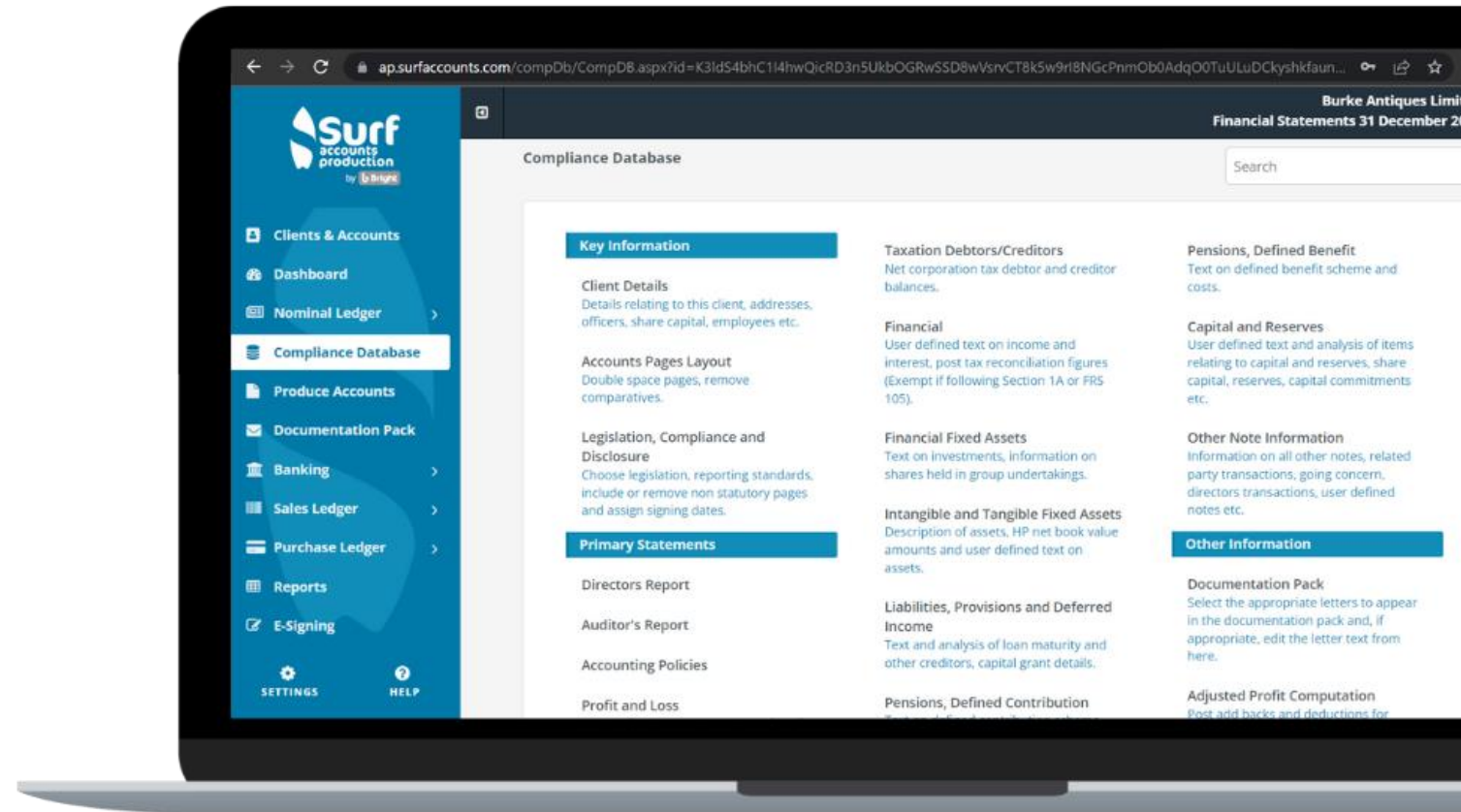
# Use a software with automatic compliance updates

## Surf Accounts Production:

Dedicated compliance team

FRS 102 Section 1A

FRS 105







## Stay informed

Keep updated on recent updates

**Check out:**

- Industry reports
- Relevant government bodies
- Accountancy blogs
- Industry leaders

How to effectively spend the  
time you've saved

## Spend more time on higher-value services

**Add advisory services to your offerings, such as:**

- Business planning
- Tax strategy
- Payroll



# Spend time on business analysis

**Here's what you should consider:**

- Where are your competitors investing?
- What are they avoiding?
- What is working for them?
- What did not work for them?



## Spend time up-skilling

### The accounting industry is ever-changing

- 42% of businesses increased their upskilling efforts during the Covid-19 pandemic
- 91% of businesses and 81% of employees say up-skilling has boosted productivity at work



## Spend time building a better place to work

**A positive culture fit can:**

- Enhance job satisfaction
- Improve job performance
- Ensure satisfaction in working lives
- Attract the best candidates



## Take a well-needed break

**You can't be at your best all the time – recharge your batteries!**

- A recent study found 99% of accountants were suffering from some level of burnout
- Take a break so you can come back at the top of your game



# Surf Accounts Demonstration





Home to award-winning payroll, accounting,  
practice management and HR software



# Questions & Answers