Automating your tax prep business:

Preparing your clients for signed agreements with Ignition, payment upfront and relationship pricing this coming tax season

The **smartest** businesses run on ignition

✦ Your expert speakers

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Agenda

* this webinar will be recorded & shared

Any advice offered in this webinar is a recommendation only

✦ Introductions

✦ Setting clear client expectations

✦ Securing upfront payments

✦ Implementing relationship pricing

✦ Revamping for tax advisory services

✦ Automating client agreements

✦ See Ignition in action

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Poll 1

What do you **know about Ignition**?

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Ignition enables accounting and professional services businesses to **reclaim time, profitability and cash flow** by automating proposals, billing, payments and workflows.

Join the **7,250 *smartest*** businesses running on Ignition.

★★★★★ Average based on thousands of reviews

xero APP STORE   intuit quickbooks   G2 CROWD   Capterra

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Setting **clear** client expectations

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Setting clear client expectations

✦ Start every client relationship with professional, clear online proposals

✦ Outline scope, fees, billing, and payment schedule upfront

✦ Ensure client buy-in and avoid scope creep

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Edit services when scope changes

Manage scope creep by editing services after a client accepts your proposal.

"A client wanted a specific billing date after signing off the original proposal. This was so easy to change, without requiring a new proposal."

Helen Dower, Superannuation Team Coordinator Morrows

> **See how it works**

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Securing upfront **payments**

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Securing Upfront Payments

✦ Collect payment details upfront at the proposal stage

✦ Ensure cash flow stability with automated payment collections

✦ Eliminate late payments and manual follow-ups

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Get paid effortlessly with auto-retries

Auto-retry failed payments

Auto-retry payments

If a payment fails, we'll attempt to take the payment again after 3 days

Let Ignition automatically retry payment collection if a payment fails and make getting paid a breeze.

> **Learn more here**

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"With Ignition, you will get paid faster. You'll get paid more and save hours of time. **It's a no-brainer!**"

Eric Green, Esq
Founder of Tax Rep Network

TRN
TAX REP NETWORK

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Implementing **relationship** pricing

Implementing Relationship Pricing

✦ Offer clients multiple proposal options to increase revenue

✦ Easily upsell services by enabling clients to add on extras to your proposals with the click of a button.

✦ Bill for out-of-scope work with transparent changes in service scope

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Quickly bill for out-of-scope work

Invoice and get paid for ad hoc work without creating a new proposal using Instant Bill.

Create

"Ignition's Instant Bill feature is a game-changer....Ad hoc, out-of-scope, and one-time invoices are now a breeze for our team."

Mike Payne, CEO
Boss Advisors

> See how it works

✦ Easily upsell with proposal add-ons

Enable clients to add on extras to your proposal with the click of a button to maximize revenue.
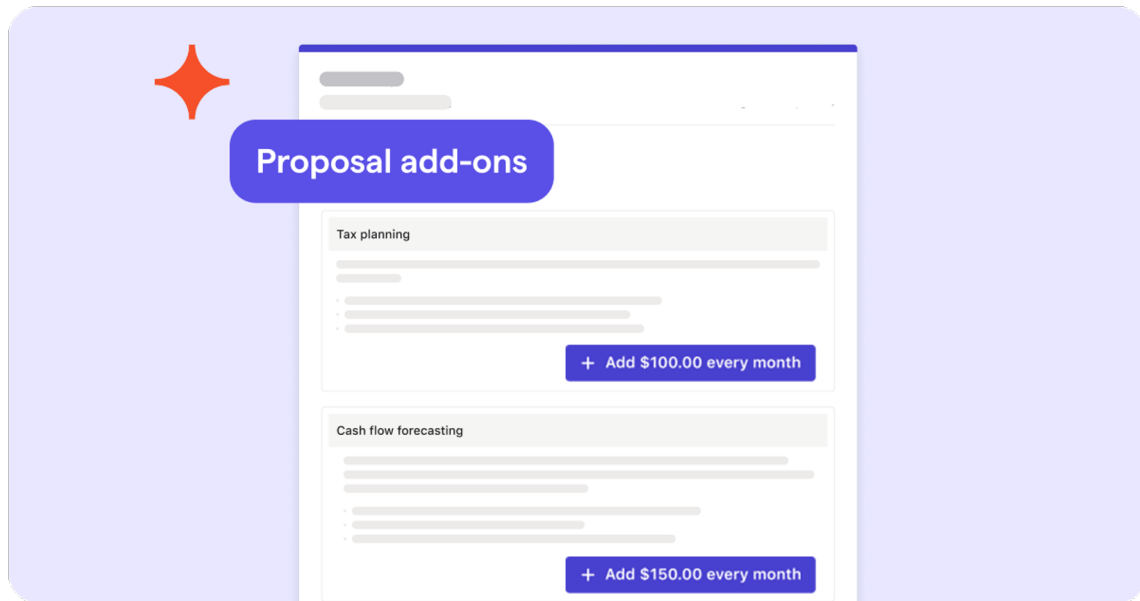
"Ignition makes it effortless to present our services to clients... I love that we can very easily present extra services for clients to add on themselves and generate more revenue without the hard sell."

Michael Ly, Founder & CEO Reconciled

> **See how it works**
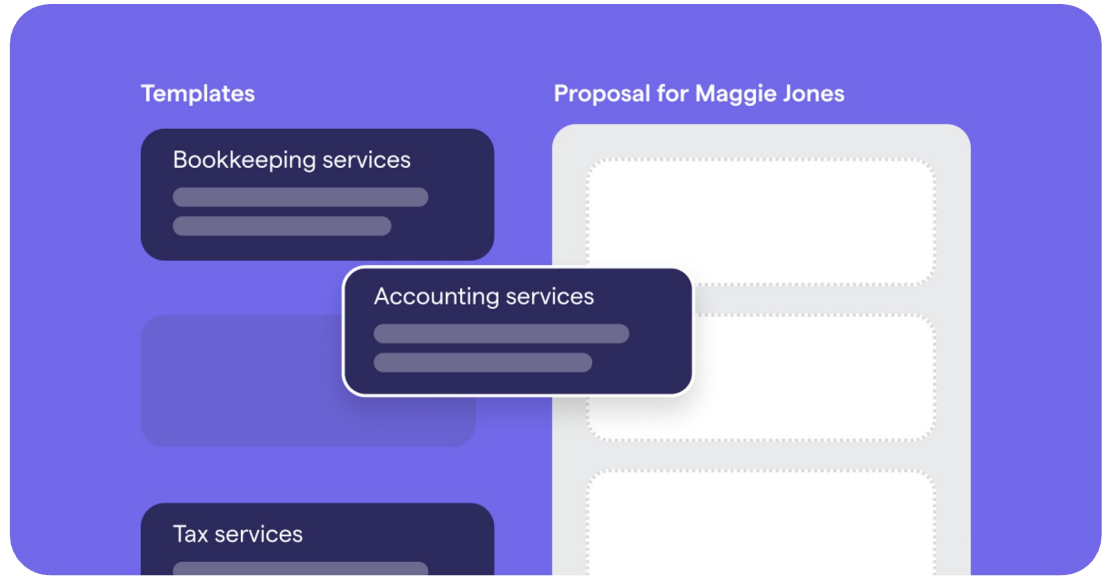
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Revamping for **tax advisory** services

Revamping for Tax Advisory Services

✦ Transition from tax prep to year-round advisory services

✦ Leverage IRS Tax Representation services to secure consistent revenue

✦ Use Ignition to identify growth opportunities

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Upsell services with TRN proposal templates

Choose from six Tax Rep Network templates right in Ignition

Build out your client list with your existing clients and contacts

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Poll 2

Would you like to test drive **Ignition** and access Eric's **IRS Representation template**s?

Automating client agreements

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Automating Client Agreements

- ✦ Easily create, send and renew annual client agreements with a few clicks

- ✦ Retain clients year after year with future-proofed revenue models

- ✦ Automate billing and payment collection

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Create, send and renew proposals in bulk

Engage 10, 100 or 1000 clients from a template in few clicks to save time.
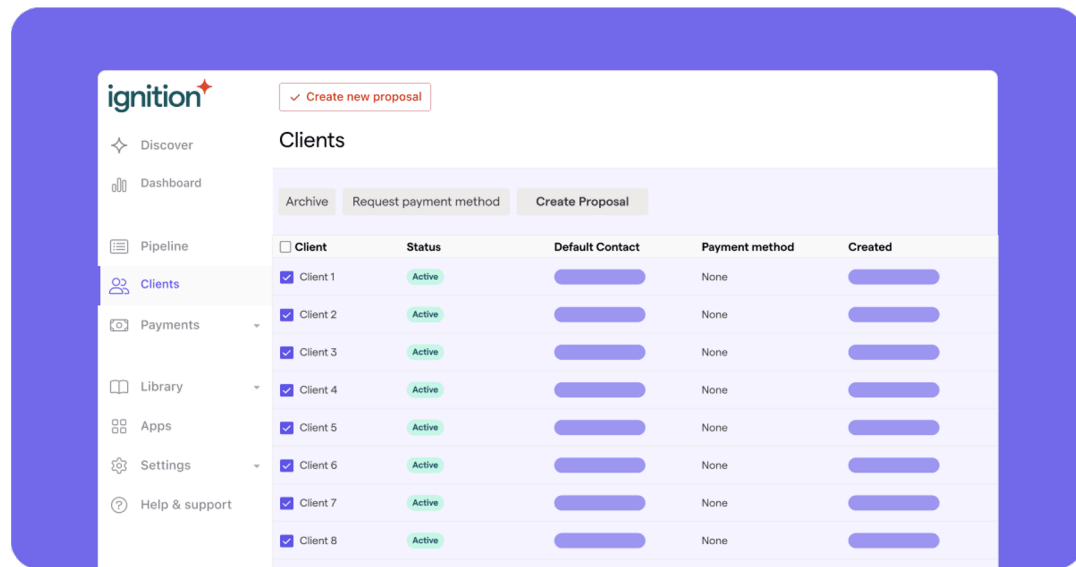
"I need to re-engage 80 clients and I can now do that in one go using a proposal template. This has made my life so much easier!"

Michael Prechel, Managing Partner
Prechel CPA

> **See how it works**

Poll 3

What's your **current readiness** to implement a new solution?

Obtain valuable assets such as

- **Training**
- **Checklists**
- **Letters**
- **Forms**
- **Live Consultations**
- **and more**

Build out year round revenue post tax season by offering IRS Tax Rep services

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Learning Objectives Recap

✦ Optimize tax prep workflows within Ignition

✦ Prevent scope creep by ensuring all work is paid for

✦ Improve client communication with clear engagement terms

✦ Maximize profits with tax advisory services year-round

✦ Achieve work-life balance through sustainable tax practice models

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✦ The smartest businesses run on Ignition

24%

average revenue growth
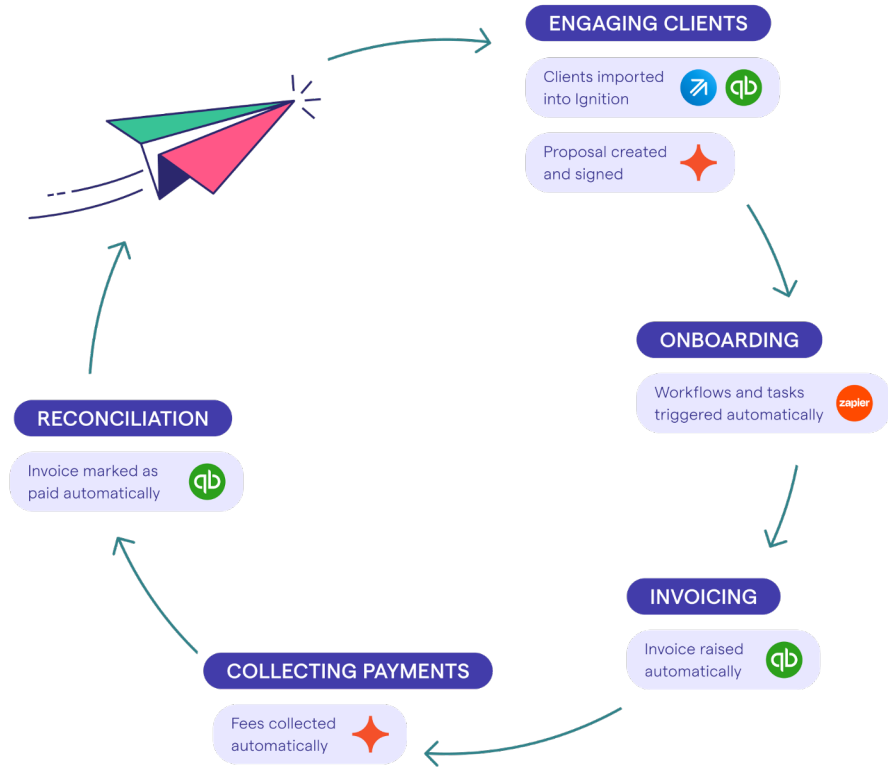in 12 months

18 hrs

saved by customers per
week on average

91%

of payments collected
automatically

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Ignition fits seamlessly into your tech stack to automate processes

ENGAGING CLIENTS

Clients imported into Ignition

Proposal created and signed

ONBOARDING

Workflows and tasks triggered automatically

INVOICING

Invoice raised automatically

COLLECTING PAYMENTS

Fees collected automatically

RECONCILIATION

Invoice marked as paid automatically

Integrations with Intuit

Product demonstration

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Poll 4

How does **your current client engagement process** & **revenue model** compare to what you're seeing here?

Thank you!