



‘Automate the Boring’ They Said Practice Ignition and Dealing with Emails from AVCA

I remember distinctly hearing about ‘Automating The Boring’ from a presenter in a business coaching group I regularly attend. I had no idea what he was referring to but as he presented his slides, the penny dropped. We broke into groups and starting discussing the really repetitive, boring tasks we all do in our businesses, and the concept of ‘Automating The Boring’ tasks became more obvious.

One of the really boring things we do in our business is Engagement Letters. Several years ago, our professional bodies made it compulsory for us to issue an Engagement Letter at the start of every engagement. It’s a standard letter approximately four pages in length the content of which would send many an insomniac to sleep, but we have to do it.

Practice Ignition

A few years ago I started looking into software that would make the process of issuing Engagement Letters a lot quicker and simpler and found Practice Ignition. This software allows us not only to create Engagement Letters, but also spell out what is in our Scope of Works and what is not. It also allows us to quote upfront for the work we do so you have certainty in the fees you will pay. Practice Ignition also allows us to direct debit the amount once the work is completed or charge the fee to your credit card.

The only extras you ever pay for are what we call ‘Out of Scope’ work which is the work we do over and above the usual year end financial statements and income tax returns. In many cases we do not charge for minor assistance, but for larger one off jobs we do.

We have been using Practice Ignition for about 12 months now and we’ve had some great feedback from clients about how it works so I thought I would send you all an update so you know how it is being used in our business:

1. Once you give us the go ahead to start a task you will receive an email from us called “Your updated Service Agreement with AV Chartered Accountants”.
2. It shows that it comes from Antony Vidray <no-reply@ignitionapp.com>. This is what we call our Practice Ignition Proposal (PIP).
3. Even though it says ‘no-reply’, you can actually reply to that email.
4. The PIP outlines the Scope of Works as well as the fee for the work to be done.
5. In most cases, the fee will be very similar to the year before or agreed beforehand.
6. We ask for details of a bank account to direct debit the fees when the work is completed.
7. Some clients have some resistance to providing their banking details but I can assure you the information is kept private at all times.

8. Keep in mind we already know your bank details from your accounting software and for when a refund is issued.

9. Our policy is to waive this option **only in rare circumstances and only if approved by one of the senior people in our business.**

10. If you prefer to pay by Credit Card, that will be fine, but in some cases we will need to update the fee quoted in the PIP to cover the Credit Card charges.

11. We can tailor the PIP so that our fees are paid up front, or after the work is completed, or paid monthly or a combination of upfront and the balance on completion, it is that flexible. All you need to do is ask, we will try and accommodate your varying cash flow needs.

12. We set the Payment Collect date **three days** before the Invoice Due Date. This is again due to client feedback and to make sure your cash flow is not disrupted and also to ensure that our fee is collected by Practice Ignition on the due date and not one day earlier.

13. When we send you the Tax Invoice, we stamp it with the following stamp:

APPROVED FOR PAYMENT VIA
PRACTICE IGNITION.
PAYMENT WILL BE DEBITED
3 DAYS BEFORE DUE DATE.
PLEASE DO NOT PAY.

14. and finally on your bank statement, it will show something like this:



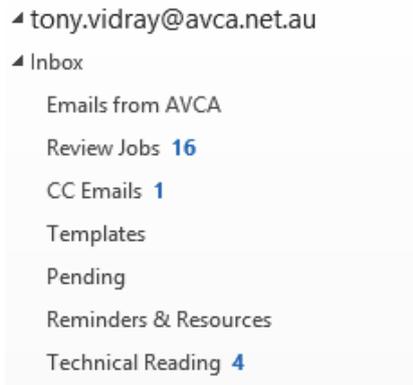
Our aim is to be as transparent as possible whilst meeting our professional obligations to our professional bodies. We like Practice Ignition because we get paid as the work is completed.

Sadly we cannot carry receivables for months on end. We appreciate the feedback we have received on Practice Ignition and we will keep fine tuning our processes to make it quick, simple and easier for you to deal with us.

Emails

A final word on emails. Yes we send a lot of them. I send you emails, the professional staff send you emails and our Admin staff send you emails. Queries, Tax Invoices, documents for you to sign on our AV Portal, the list goes on and on, we know. It's a sad reality of modern communication and there is not a lot we can do about it. We could go back to posting things out by paper but Australia Post now take five to seven business days to deliver the mail and that has become too inefficient.

For that reason, we recommend you set up an AVCA folder in your Inbox that looks like this:



Then set up a rule so that emails with **@avca.net.au** in the sender's email address are parked in that AVCA folder. That way ALL your AVCA emails are in the ONE spot for you to deal with when you can.

I have about 25-30 rules setup in my Inbox. As you can see jobs I have to review are in one folder (yes I have few to get to!). Technical reading goes into one folder. Emails from my wife are automatically deleted.....I'm kidding, they are given top priority.

Automating the Boring. The technology is at your fingertips so make sure it works for you.

If you need any help in setting these things up, please contact us and we will assist you.

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Email: mail@avca.net.au

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