



How Lance CPA Group automated their engagement letters for tax season

“Practice Ignition hasn’t just helped us save time creating engagement letters - it’s everything. We save time getting letter out of the door. We save follow-up time getting clients to sign. We save time chasing payments. All in all, we save about a month’s worth of man-hours every year, on top of the real dollars we save by ensuring that we get paid in advance for the work we do.”



Josh Lance,
Managing Director,
Lance CPA Group

The Client: Lance CPA Group



Industry: Accounting

Location: Westmont & Chicago (USA)

What we provided: Streamlined internal engagement process

- Automatic payment function
- Engagement letters
- Workflow integrations
- Built-in analytics

The challenge

Mailing out 400+ engagement letters before tax season

When Lance CPA Group first opened its doors in 2014, manually creating engagement letters for tax clients wasn't a big deal. But six years later, both business and their client list had grown. Now, Lance CPA Group needed to prepare unique engagement letters for more than 400 clients.

The process was arduous, time-consuming, and stressful. It took one employee a full week to draft the letters and ensure that every detail, such as client-specific pricing, was accurate. Worse still, after the letters were sent, some clients took weeks or even months to sign them, which required significant follow up.

When that happened Managing Director Josh Lance needed to step in and determine: Did client X sign their engagement letter? Did

we forget to send it? Do we have to follow-up? Did we get paid for this work?

He soon realized that he was spending all of his time verifying engagement letters instead of actually managing his firm. And he knew that as Lance CPA Group continued to grow, the problem would only get worse.

Before the problem spiraled out of control, Josh turned to Practice Ignition.

“We were doing roughly 400 tax returns a year. That’s 400 engagement letters that have to go out. We had to create each letter, make sure we had the right tax return, change prices, and keep everything accurate. One employee spent a week just putting together engagement letters.”

The solution

A centralized platform for controlling engagement

With tax returns demanding so much time and making up about 25% of his firm's business, Josh decided to have Practice Ignition prepare engagement letters just for his tax clients.

The simplicity of the system still astounds him.

Now, Josh can send out engagement letters all at once instead of individually. The platform also tracks when clients sign and allows easy payment options, such as credit card or direct debit/ACH, ensuring that Lance CPA Group gets paid for the work they do.

The platform doesn't just increase efficiency on Josh's end either—he's received nothing

but positive response from his clients. Engagement letters are signed more readily, payments are on time, and clients are able to see and sign-off on changes as they occur.

Practice Ignition takes the guesswork out of the engagement process and Josh always knows where his firm stands vis-à-vis their engagement letters.

“Practice Ignition integrates with our accounting software to generate invoices and automate the engagement process. Now we don’t have to think about personalizing invoices or cash collection or issuing receipts of payment. Practice Ignition does it all for us, so we can focus more on being strategic and serving our clients.”

The result

90% increase in overall efficiency

After successfully implementing Practice Ignition for their tax clients, Josh has since rolled out this new engagement process for all of his clients. Engagement letters, invoices, and payment processes are all automated and integrated with the software Lance CPA Group was already using.

Now, instead of creating engagement letters from scratch year-after-year, Josh can just roll

them forward, edit a couple key details, and send them out en masse. Best of all, Josh always knows when they’ve been received, when they’ve been signed, and when he needs to follow up.

Josh also used Practice Ignition to implement a 20% upfront deposit on client tax returns. This helps his firm have a source of cash flow early on during tax season, and it’s eliminated the risk of clients disappearing when it’s time to pay their invoices.

The end results, by Josh’s estimation, are countless administrative hours saved and a 90% increase in day-to-day efficiency. The preparation, engagement letter creation, and back-and-forth that used to take nearly a month can now be accomplished automatically in an hour.

“At first, we only used Practice Ignition to create engagement letters for our tax clients. Now, we use them for engagement letters, invoicing, payment processes—everything, for all of our clients. And it hasn’t just helped me manage my firm; it’s helped our admins, our tax team, our accountants, and even our clients. It’s a much better process.”



91%

of our customers spend less time creating proposals, and chasing signatures and payments

87%

were able to cancel other software subscriptions

80%

have fewer (or no) unpaid invoices at any given time

And the majority of Practice Ignition customers are closing more and bigger deals...

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