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Klass Concepts

BUSINESS EFFICIENCY REPORT

Your Business, Running Smarter

Sample Report — Riverstone Tax & Bookkeeping

PREPARED BY

Klass

Concepts

INDUSTRY

Tax & Bookkeeping

Services

REPORT

DATE

April 2026

REPORT TYPE

Sample /

Marketing

4

QUICK WINS

6

AREAS REVIEWED

5+

HOURS SAVED / WEEK

11

RECOMMENDATIONS

★ **SAMPLE REPORT** — This is an example of a completed Business Efficiency Report ★

Riverstone Tax & Bookkeeping has a solid reputation and a loyal client base — but its internal operations are quietly costing time and money every single day. During this efficiency review, we identified several gaps in digital communication, client workflow, and marketing that, once addressed, will free up hours each week and project a more professional image to clients and prospects.

The good news: most of these issues are straightforward to fix. Several can be resolved in a single afternoon. The recommendations below are organized by priority, and each one includes exactly what we do and how long it takes — so there are no surprises.

3**Email &
Communication**

Domain authentication missing; no templates; inconsistent signatures

5**Website & Online
Presence**

Functional but outdated; no analytics; slow page load

2**Client Management**

Tracking in spreadsheets; no follow-up system; manual scheduling

2**Marketing & Outreach**

No newsletter; referrals not systematized; weak social presence

5**Operations & Files**

No standard folder structure; documents scattered across devices

4**Security & Backup**

No 2FA on key accounts; backup process unclear; weak password hygiene

✓ QUICK WINS

Do this week — low effort, immediate impact

1

Protect Your Email Domain From Spoofing

High Impact

Low Effort

Your email domain is missing three critical authentication records: SPF, DKIM, and DMARC. Without them, bad actors can send emails that appear to come from your address — and your own emails are far more likely to land in spam. This is especially damaging for a firm whose clients expect confidential, trustworthy communication.

HOW WE DO IT We log into your DNS provider (GoDaddy, Cloudflare, Namecheap, or wherever your domain is registered) and add three DNS records. **SPF** tells receiving mail servers which senders are authorized to use your domain. **DKIM** adds a cryptographic signature to every email you send, proving it hasn't been tampered with. **DMARC** tells servers what to do if an email fails both checks — and sends you a daily digest of any spoofing attempts. After 24–48 hours for DNS propagation, we verify all three records are active and passing using a third-party validation tool. **45–60 min**

2

Create a Consistent, Professional Email Signature

High Impact

Low Effort

Every email your team sends is a marketing touchpoint. Right now, signatures vary across team members — some have too little information, some have none at all. A standardized signature with your logo, name, title, phone number, website, and a direct scheduling link adds instant credibility and makes it effortless for clients to take the next step.

HOW WE DO IT We design one master HTML email signature using your existing logo and brand colors. It includes your name, title, direct phone number, website link, a “Schedule a Call” button linked to your scheduling page, and an optional headshot. We install it in every team member’s email client (Gmail, Outlook, or Apple Mail) and test it on both desktop and mobile to confirm it renders correctly. All team members get the same signature with only their personal details swapped.

30–45 min

3

Enable Two-Factor Authentication on Key Accounts

High Impact

Low Effort

None of your critical business accounts currently require two-factor authentication at login. A stolen password alone is enough to hand an attacker full access to your email, client files, and financial accounts. Given that you handle sensitive tax and financial data, this is not optional — and it takes only minutes per account to fix.

HOW WE DO IT We walk through enabling 2FA on your business email (Gmail or Microsoft 365), cloud file storage (Google Drive, Dropbox, or OneDrive), your accounting software, and any payment processing accounts. We set up an authenticator app — **Google Authenticator** or **Authy** — rather than SMS-based codes, which are easier to intercept. We generate and securely store backup recovery codes so you are never locked out. Every team member who has account access goes through the same setup. **60–90 min total**

4

Set Up a Shared Document Folder Structure

Medium Impact

Low Effort

Client documents are currently in multiple locations: some on a local hard drive, some in email attachments, some in cloud storage with no consistent naming. Time spent hunting for a prior-year return or a signed engagement letter is wasted time — and the risk of sending the wrong document to the wrong client is real.

HOW WE DO IT We design a standard folder hierarchy inside your existing cloud storage (Google Drive or similar): one top-level folder per client, with consistent subfolders for each tax year and document type (Source Documents, Returns Filed, Signed Engagement Letters, Correspondence). We create the folder template, apply it to your current active clients, and migrate existing loose files into the right locations. We set sharing permissions so that each team member can access what they need and nothing else. **2–3 hrs**

→ **SHORT-TERM**

Next 30–60 days — builds lasting efficiency

5

Build an Email List From Your Existing Clients

High Impact

Moderate Effort

You already have the most valuable marketing asset a small business can have: a list of people who trust you. But there is no system to stay in regular contact with them outside of tax season. A simple monthly or quarterly newsletter keeps you top-of-mind when a client's friend asks for a referral — or when a client needs bookkeeping help mid-year and almost forgot you offer it.

HOW WE DO IT We set up a free account in **Mailchimp** (or your preferred tool), import your existing client list, and send a one-time opt-in confirmation so your list is compliant with CAN-SPAM. We build a simple, on-brand newsletter template you can fill in yourself in under 20 minutes — no design work required each time. We also write a short welcome email sequence (2–3 messages) that goes out automatically to any new client you add to the list. **3–4 hrs**

6

Create Email Templates for Common Client Interactions

High Impact

Moderate Effort

Your team sends the same types of emails dozens of times per week: appointment confirmations, document request checklists, status updates, and end-of-engagement follow-ups. Writing each one from scratch wastes time and produces inconsistent results. Templates ensure every client gets the same professional, complete message — regardless of who on your team sends it.

HOW WE DO IT We start with a 30-minute interview to map your most common email scenarios. We then write six ready-to-use templates: **(1)** New client welcome with onboarding checklist, **(2)** Document request list with clear instructions, **(3)** Appointment confirmation with prep instructions, **(4)** Appointment reminder (24-hour), **(5)** Status update / return in progress, **(6)** End-of-engagement thank-you with referral ask. Templates are loaded directly into Gmail Canned Responses or Outlook Quick Parts so they are one click away from any email window. **2–3 hrs**

7

Add Online Scheduling for Consultations

High Impact

Low Effort

Every new client inquiry that requires back-and-forth emails to find a meeting time is a friction point — and an opportunity for the prospect to lose interest or book a competitor instead. A scheduling link in your email signature and website lets prospects pick a time and confirm in under two minutes, with zero effort on your end.

HOW WE DO IT We set up a **Calendly** account (free tier), configure your availability windows, buffer times between appointments, and two meeting types: a 15-minute free consultation and a 60-minute paid tax review. We connect it to your Google or Outlook calendar so it always reflects your real availability. Automatic confirmation emails and 24-hour reminder emails are configured and go out without any action on your part. We then embed the booking link in your email signature, your website contact page, and your Google Business Profile. **1-2 hrs**

8

Update and Optimize Your Google Business Profile

Medium Impact

Your Google Business listing is your most visible free marketing asset — and right now it is incomplete. Missing business hours, outdated service descriptions, and no photos cost you local search visibility and credibility with prospects who look you up before calling. A complete, accurate listing is often the difference between a call and a scroll-past.

Low Effort

HOW WE DO IT We claim or access your existing Google Business Profile, then complete a full update: current hours (including seasonal variations), your complete service list with descriptions, an optimized business description using locally relevant keywords, a set of professional photos (exterior, interior, team, or logo), and your scheduling link. We respond to any existing unanswered reviews with appropriate language. We also set up the review request feature so you can send a one-click review request to clients directly from the dashboard.

1-2 hrs

◆ STRATEGIC PRIORITIES

60–90 days — positions you for sustainable growth

9

Implement a Lightweight Client Tracking System

High Impact

Spreadsheets cannot scale with a growing client base. There is no reliable way to see at a glance who is

Moderate Effort

waiting on documents, whose return is overdue, or who hasn't been contacted since last April. A purpose-fit client tracking system replaces guesswork with a clear, consistent picture of every relationship — and prevents anyone from slipping through the cracks.

HOW WE DO IT We evaluate your workflow and select the right tool — typically **HubSpot CRM** (free tier), **Notion**, or a structured **Airtable** base depending on team size and preference. We configure it with fields relevant to your practice: client status, outstanding document items, current-year filing deadline, last contact date, and follow-up reminders. We import your existing client list, set up filtered views for “awaiting documents,” “in progress,” and “filed,” and run a one-hour training session with your team. **4–6 hrs incl. training**

10

Automate Payment Reminders and Receipts

High Impact

Moderate Effort

Manually following up on unpaid invoices is time-consuming, uncomfortable, and easy to forget. It also creates the impression — fairly or not — that collections are disorganized. Automated reminders before and after the due date, combined with instant receipt emails, significantly reduce time-to-payment and eliminate most of the awkward follow-up conversations.

HOW WE DO IT If you use **QuickBooks**, **FreshBooks**, or **Wave**, automated reminders are already built in but almost certainly not configured. We enable and customize a four-message reminder schedule: 7 days before due, 3 days before due, on the due date, and 7 days overdue. We write the language for each message so they are firm but professional. We also configure instant receipt emails so clients are automatically acknowledged the moment a payment clears, and activate online payment links so clients can pay by card or ACH directly from the invoice without calling in. **1–2 hrs**

11

Build a Referral System That Runs Itself

High Impact

Moderate Effort

Most of your new business likely comes from word of mouth — but there is no system to encourage, track, or reward it. That means referrals happen when they happen, and satisfied clients who would happily refer a friend simply never think to do it. A structured referral

program with a clear incentive and a consistent follow-through process turns occasional referrals into a reliable, repeatable pipeline.

HOW WE DO IT We design a one-page referral program with a clear incentive (e.g., a \$50 credit or Amazon gift card per referred client who completes a return), write a referral ask email you send to your top 20 current clients, and create a simple thank-you message that goes out automatically when a referred client books their first appointment. We add a referral tracking field to your client management system so no referral goes unacknowledged. We also add a "Refer a Friend" section to the end-of-engagement email template (Recommendation #6) so the ask happens automatically at the right moment. **2-3 hrs**



5+ Hours Saved Per Week

Templates, automated scheduling, and payment reminders eliminate the most repetitive time drains — hours you can redirect toward client work, business development, or simply leaving on time.

Significantly Reduced Security Risk

Domain authentication and two-factor authentication together block the most common forms of business email compromise — critical protections for a firm handling sensitive client financial data.

More Consistent New Clients

A working referral system, an optimized Google listing, and a regular email newsletter transform sporadic word-of-mouth into a steady, predictable stream of warm leads who already trust you.

A More Professional Image

Consistent signatures, online scheduling, polished templates, and instant payment receipts signal that you run a professional operation — the kind clients recommend without hesitation.

About Klass Concepts

Klass Concepts helps small businesses identify the technology gaps and process inefficiencies that quietly cost time, money, and credibility — and then fixes them. We are not a software company or an IT firm. We are a business efficiency partner who speaks plain English, works alongside you, and delivers results you can see on day one.

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This is a sample report for marketing purposes. Client names and details are fictional.