

WHERE ACCOUNTING FIRMS LOSE THE MOST HOURS

PROSPYR 305

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The three workflows worth automating first in a CPA or bookkeeping practice.

The pattern: your season is capped by admin work that scales with client count, not with value delivered. Freeing those hours is what turns a compliance practice into an advisory one. These three come first, in this order.

Where it goes

Where to start

Client document collection

8 to 20 hrs/wk in season

Chasing the same missing W-2, statement, and receipt from every client, by email and phone, for months. This is the single largest recoverable block of time in most practices.

Bookkeeping close and reconciliation

5 to 12 hrs/wk

Categorising, matching, and reconciling the same recurring transactions every month by hand. The work is real but the judgment is low, which makes it the cleanest automation candidate.

Return assembly and review prep

3 to 8 hrs/wk in season

Pulling prior-year data, checking carry-forwards, and assembling the file before a reviewer ever sees it. Prepared automatically, review starts at the review instead of the assembly.

Method

How We Build It

STEP 1

Assess (free 20-min scan)

We map the real bottlenecks by financial cost, not by annoyance. If a workflow should not be automated, we will tell you so explicitly.

STEP 2

Build & integrate

We automate the hand-typing around the tools you already use, tested against live operational data. A human always retains final judgment.

STEP 3

Run with receipts

Monitored with an auditable log of every action taken. You own the system entirely, with no per-seat software tax.

THE PROSPYR 305 GUARANTEE

One workflow, automated in 30 days, saving at least 10 hours a week, or you do not pay. **You own the software and remain in control.**

NEXT STEP: BOOK YOUR FREE SCAN

Bring your highest-scoring workflow and your cost estimate. We map it live at prospyr305.com/contact.

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