

# A quick win checklist: Solve your firm's hidden inefficiencies

## Automate your client data collection

Use an online form such as Typeform to collect standard data needed for each new client.

## Document and standardize all new processes

Create a document location, where staff can document and standardize all new processes (don't forget to clearly communicate this initiative to your team).

*Bonus: Assign each staff member a set number of current processes to document and standardize (remember to set deadlines to keep them on track).*

## Eliminate all internal emails

Implement a communication tool like Slack or Microsoft Teams, and empower team members to move all internal communication away from your inboxes.

## Boost communications

Incorporate clear communication as one of your firm's values, and explain to your team what that means, and why you've made this update.

*Bonus: Never set a task without a deadline—empower your team to do the same.*

## Stop context-switching

Encourage your team to minimize context-switching and increase productivity with time blocking or themed work days.

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