

GUIDE



The limit does not exist

How to use Rightworks OneSpace Firm Premier to increase your profits and scale



When it comes to technology, what matters most to *you*?



This guide is for accountants who want more from their solution. The professionals who want to focus on their job—then get back to what matters.

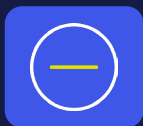
The firm leaders who want to grow relationships with existing clients, improve their bottom lines, but not shake the very foundation they've spent years cultivating.

If this sounds like you, you're in for a treat.

Using this guide, you'll learn how to use Rightworks OneSpace Firm Premier to its fullest potential and:

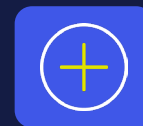
1. **Save technology costs** with timesaving strategies and new offers.
2. **Improve the culture** of your practice with tools that enable safe, flexible work policies.
3. **Scale...intelligently.**

How to use OneSpace Firm Premier to increase profitability



GOODBYE

1. Server maintenance
2. Storage hassles
3. Licensing woes
4. Irregular technology upgrades
5. Security management



HELLO

1. Client focus
2. Peace of mind
3. Work-anywhere flexibility
4. Talent retention
5. Financial stability

Time is money

You may be asking yourself: How does purchasing a solution actually make me money?

When you wave goodbye to the things that distract you from doing your job, you make room for financial growth. It's as simple as that.

Here are three ways we help OneSpace Firm Premier customers automatically save time:

- **By avoiding unscheduled downtime:** Downtime—or the time your technology stops you from being able to work—is the biggest and most obvious time suck. OneSpace Firm Premier helps you avoid downtime by scheduling anything that could cause downtime around your firm's work schedule.
- **By completely handling IT for you:** Apps, infrastructure, security—we've got it covered. So, you can get back to what actually matters: serving your clients and clocking out on time.
- **By supporting you 24/7/365:** Literally, OneSpace Firm Premier support is open 24/7/365 to answer any of your (or your personnel's) technology questions. And we have the lowest hold times around, so you'll get your answers fast—then get back to business.

Create your own offers

Another way to use OneSpace Firm Premier to increase your profitability? By using it to create new offers.

That's right. Rightworks enables you to easily deliver client accounting and advisory services. **With our help, you can set up your own clients to receive the business version of the same solutions you use in three simple steps:**

- Refer your clients to OneSpace for secure application access.
- Repackage Managed Security as one of your firm's advisory offers.
- Deepen your client relationships and increase value—we'll handle the tech.

It really is that simple.

Rightworks Connect

And speaking of deepening client relationships: Just for being a OneSpace Firm Premier customer, you also have access to Connect.

Connect is a tool accounting firms use to identify not only key opportunities in their existing client base, but also to identify their ideal type of client.

- Expand relationships with your best clients.
- Increase efficiency, not workload.
- Service clients more effectively.

How to scale intelligently

“Now that I’m growing like crazy, I don’t have enough staff, and it’s becoming incredibly difficult to meet my clients’ demands.”

Sound familiar? Growth may be a good problem to have, but it’s still a problem.

Intelligent growth means kicking away the barriers before they even come up. Even if you’ve already run into retention challenges or subpar IT support, you don’t need to let that be your future.

OneSpace Firm Premier enables intelligent growth by setting you up for success with:

- Tools that make it easy to securely collaborate.
- A team of IT experts who’ve devoted their careers to understanding and improving how accounting and tax software operates.
- Complete protection in the form of multifactor authentication (MFA), device security, employee security training, onsite security services, backups, etc.

In short, OneSpace Firm Premier is there alongside you to support your growth. Our technology will scale to meet whatever your practice and your

Did you know? Unlike other leading cloud services, OneSpace Firm Premier allows users to use Zoom, Teams or other local collaboration apps on the same monitor.

people demand. We’re here to support whatever you need, whenever you need it. It’s really that easy.

Collaboration and culture

Once you have your team, you need to be able to set them up with the right tools and culture. **Here’s how OneSpace Firm Premier gives you both:**

- **It supports a hybrid, flexible, remote workforce:** No matter if your firm works solely in the office or has locations scattered about the US, every employee will have the same experience. Its web-based access means the “work anywhere” culture is built in.
- **A single login brings you to it all:** Speaking of experience. OneSpace Firm Premier contains everything that you’d need in a single pane of glass: a knowledgebase, an integrated firm directory, apps and chat.
- **Admins can add new users in minutes:** If you need to add entirely new offices, you can quickly add new users and give them the applications and security settings they need, right from within your console.
- **Better technology = better people:** Employee retention and best-in-class technology go hand in hand. It will be the key to your success as you look to increase your capacity and scale your business.
- **It frees up employees’ time:** Let your people do what they were hired to do. Give them time back to focus on strategy and clients. Keeping their technology running smoothly? That’s our job.



Get the most out of IT

Now that you know how to make the most of OneSpace Firm Premier—what's next on your agenda? Because for you, and your firm, the limit truly does not exist.

For more information about scaling with OneSpace Firm Premier, give us a call at **888.210.0237**

 **rightworks**

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