

CASE STUDY

How a Brampton CPA Firm Runs Its Whole Practice Without Missing a Deadline

FIRM B S SAINI PROFESSIONAL CORPORATION	LOCATION Brampton, Ontario	PRACTICE Large volume of business and personal clients	TEAM ON MYCPACRM Partners + staff, every working day
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THE CHALLENGE

With an expansive client base and countless active files, the firm was juggling **thousands of annual compliance deadlines**, including Corp T2, GST/HST, payroll, T1, and WSIB, originally tracked only in spreadsheets and the partners' heads.

- One missed deadline means a penalty for the client.
- Reminding clients and chasing documents was done one email at a time.
- Booking and tracking appointments was manual and scattered.
- No single place for the team to see what was done and what was at risk.

THE SOLUTION

- **Every deadline tracked automatically**, from GST/HST and payroll to Corp T2, T1 and WSIB, with the calendar loaded years ahead.
- **Reminders go out on their own.** A multi-step sequence, up to **6 reminders for a single corporate return**, runs until the client responds. **10,000+ reminders are set**, none sent by hand.
- **Appointments and filing status in one shared view**, so the whole team sees what's done, what's in progress, and who's on it.

THE RESULTS: A YEAR ON MYCPACRM

Zero missed deadlines Thousands tracked, nothing slips through	10,000+ automated reminders set Up to 6 per corporate return	1,000+ appointments a year All booked & managed in one place	500+ staff hours freed up / yr Equal to 12+ full work weeks
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USED BY THE WHOLE TEAM, EVERY WORKING DAY. A system the firm runs on, not shelfware.

WHAT THE PARTNERS SAY

“MyCPACRM gives me complete peace of mind. I don't worry about missing a deadline anymore. The system tells me exactly what needs to be done, and it reminds all my clients automatically. It's all done for me.”

BS Balvir Saini, CPA
Partner

“I can see exactly where every file is, so our whole team works better together. We always know which client documents are in and what's still missing, and nothing falls through the cracks.”

SS Sandeep Saini, CPA
Partner

Run your firm the same way. Never miss a deadline, never chase a client by hand again.

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