



10 times faster

How South African firm Iridium has transformed their proposals and engagement letters with Practice Ignition

“The ease of sending out a proposal, proposal consistency in terms of wording and layout, the visual appeal of proposals, and the speed at which we’re able to onboard and bill new clients has dramatically improved. Plus, our conversion rate is up 25%.”



Peter Wagner, CA (SA)
Sales and Marketing Director



The client:

Iridium Business Solutions



Industry: Accounting

Location: South Africa

What we provided: Streamlined internal engagement process

- Built-in proposal and engagement letter templates
- Workflow integrations with critical systems (Xero, Karbon)
- Built-in analytics

Iridium is a South-African professional services company that specializes in Cloud Accounting and business advisory. By integrating technology into their day-to-day accounting and management practices, they've helped hundreds of businesses streamline and optimize all of their accounting, payroll, and file management needs.

The challenge

Lack of standardised proposals resulting in wasted time and resources

In the early days, Iridium created all of their proposals in Microsoft Word. They had no engagement letter to speak of and many proposals lacked proper terms and conditions.

But as the company grew, the lack of standardisation was leading to issues:

1. Manually creating proposals wasted time and resources. The office manager created each proposal from scratch before passing it to a director for review. Edits added even more time.

2. Inconsistencies crept into the onboarding process. The lack of standardisation meant different clients might mistakenly get charged different amounts for the same services, cutting into their margins.

3. Engagements lacked accountability. With no system to track signatures or set up recurring payments, Iridium just trusted that their clients would pay on time.

As their list of clients hit triple digits, Marketing Director Peter Wagner knew they needed a change. He needed a solution that would allow him to add new clients, select a template, customise one or two things and then go—but most proved too difficult to use or customise.

“We tried another product that was quite clunky when it came to putting together proposals. It wasn't customisable and it was difficult to add or remove services from templates. On top of that, it didn't integrate with Xero. It didn't solve our needs so we continued using Microsoft.”

The solution

Templates that are intuitive for Iridium and its clients

It wasn't until Peter came across Practice Ignition that he found the solution he'd been seeking with a library of the engagement letter and proposal templates pre-built. Practice Ignition could even upload Iridium's clients into the platform and implement specific customisations to make every proposal look and feel exactly the way they want.

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Better yet, Practice Ignition connects with the tools Iridium uses daily. For example, the office manager can automatically move all of the workflows outlined in a proposal directly into Karbon to kick off workflow management. Practice Ignition also integrates seamlessly with Xero, simplifying and streamlining recurring billing.

Best of all, Practice Ignition makes life infinitely easier—both for Iridium and its clients. Iridium can track the new engagement letters and see at a glance who has signed—and who hasn't. Meanwhile, the new engagement letters clearly state terms and conditions, outline Iridium's process, and allow clients to ratify and sign the document with a few simple clicks.

“Hardly anyone rejects our proposals anymore. We've been able to up our pricing and we're getting more wins over the line.”

The result

New proposals created and sent 10x faster

Practice Ignition has eliminated all of the tedious back-and-forth that used to go into the old proposal creation process. According to Peter, it now only takes his office manager **three to five minutes to create new proposals and get them sent to the client**—a 10th of the time it used to take.

Peter calls Practice Ignition “a big win in terms of efficiency and accuracy,” and he says that more than one client has taken note of how simple the proposals make life for them. By his estimation, since implementation, **Iridium's client conversion rate has increased 20–25%**.

“Speed is a massive part of the ‘wow factor’ that helps us land more clients. By kicking out a proposal within 10 minutes of getting off the phone with a potential new client, we're much more likely to get their work. And we often hear, ‘Wow—it's so easy to use.’”



91%

of our customers spend less time
creating proposals and chasing
signatures and payments

87%

were able to cancel other
software subscriptions

80%

have fewer (or no) unpaid
invoices at any given time

**And the majority of Practice Ignition
customers are closing more and bigger deals...**

Start free 14 day trial today