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Here are a few questions regarding your firm: Do you have too many staff? Are too many staff leaving? Are you having difficulty recruiting new staff? What staffing needs are not being met?

- The accounting profession is experiencing a growing demand for its skill and time.
- The U.S. Department of Labor projects accounting jobs will continue to grow.
- Accountants in public practice report a lack of qualified accounting professionals.

Finding qualified staff is a key issue for proper management of every tax and accounting firm. With the growing volume of things to be known and recallable, the accessibility of technology support is crucial. Knowledge management systems can help with the archiving and retrieval of documents of any length. Public accountants have to use technology to support the work being done.

Potential accounting staff have more choices to do what they want. A recent story in USA TODAY ([www.usatoday.com](http://www.usatoday.com); 12/11/2006) discusses how “a new generation of entrepreneurs is launching millions of tiny companies differing from business in the past: They don’t want employees.” This is a trend for people who do not want to be controlled by office type procedures and large banks of cubicles and desks. The article identified that in 2006 “20 million out of the 25 million small businesses in this country now are one-person microbusinesses.” The question about how people can run one-person businesses was answered by the article with the following: “You know the answer: technology. Technology, especially computer-related technology,

has changed business radically in the last 20 years and in fact is the most significant

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in accounting professionals.

- Growing a tax and accounting firm requires expanding services to non-audit companies.
- The increase in college accounting course enrollment can translate to more staff availability. At this same time, there is increasing competition for each graduate.

Competent staff, the kind everyone wants, have choices of what to do with their lives. Some want to pursue their own businesses. The question to answer is how to attract the good, better, and best to move into the world of public accounting and actually have them stay for awhile.

Ken Kirkland, managing partner of KAF Financial Group, Massachusetts, knows that “Competition is fierce for talented accounting professionals.” He further stated that with this problem, “Staff were not leaving to go to other accounting firms; they were leaving the industry.”

KAF has a work-life balance program that closes the office during the tax season and restricts staff to in-office work on only four Saturdays. This reduced the volume of man-hours worked, and the firm increased overall revenues while making the staff far more satisfied with their work environment. Following the balance program, Ken Kirkland managed to hit the ski slope every Saturday during his 21st century version of “busy season.”

## **STAFFING DEMOGRAPHICS**

Staffing is most often described as recruiting new folks out of college and bringing them into a firm for the first time. But staffing is a whole lot more than just that. First, staff comes in all sizes, genders and ages — young people, old people and the

in-betweeners. Staffing has to include everyone at every age, from new junior recruits

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support their activities. Tax returns are not done by pencil and carbon paper. Audit worksheets are not prepared with a re-sharpened pencil. Client correspondence is not accomplished with an IBM selectric, paper envelope and 41 cent stamp.

Staff knows that the work needs to be done. They also know that often the location of where that work is done is irrelevant. Because of technology, preparing a tax return requires the staff person to have client contact and then be in front of their computer. Where the computer is — office, home, coffee bar, car, airport, ski lodge, cruise ship, et al — is irrelevant. The computer needs to be securely connected to the application and the data. Good computer implementation will support the connectivity among individual staff, their computer, the host server and the necessary security procedures to protect confidentiality and privacy.

Workflow automation and engagement management are just two of the applications that are better when they are supported by technology. One of the vendors providing such software is XCM ([www.xcmsolutions.com](http://www.xcmsolutions.com)). The application supports engagement management and automates information necessary to monitor, control and report on work being done.

This screenshot shows one dashboard report of the status of an engagement. This information is accessible from any office or remote location. In this way, every staff can access the company system to learn of work status and their next assignment and deadlines. At KAF, XCM instills a best practices approach to every aspect of the firm.

The foundation for using technology is that electronic data is faster than moving paper around. Sending a document across the country made history with the Pony Express, Parcel Post and then Federal Express. Facsimile did lots to improve speed, and then the Internet raised the speed bar.

This capability to have real-time information allows management control to flow at

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COO, DiCicco, Gulman & Company LLP, knows about the need to focus on investing in technology with efficiency. The firm has a clear vision of its requirement to be able to work from anywhere. "The flexibility to perform tasks from anywhere, not just with e-mail, can keep projects going," says Burke.

Firms using remote access have a distinct advantage in supporting staff. In a paper-driven world, too much effort is expended in non-interesting, mechanical processes. Staff members want to be challenged and enjoy exercising thought for every task. This means using technology. Burke has experienced significant benefits from walking recruits through the office where they can see how triple monitors are on every desk and paper clutter on desktops is minimal or non-existent. The staff attitude towards work tasks without technology can be summarized in the following graphic, courtesy of Glen Keenan, President of XCM Solutions and XPITAX, LLC.

With this many tasks surrounding each piece of paper, the effort to implement technology to reduce these steps is essential.

Everyone uses the Internet to access a vast amount of information. Firms need to recognize that the good prospective candidates will make the effort to research any prospective employer. This includes doing standard Google-type searches, viewing the company website, and doing comparisons with the data retrieved among all prospective employers.

Consequently, it is essential for firms to know what is being discussed in the cyber world about the firm, its partners and its history. This can include MySpace, YouTube and other social networking or chat sites. The first research location will often be the firm website. This can be the initial point of contact for the new applicant, and they will often be looking for answers to these questions:

- How does the firm describe itself?

- What does the firm show as important?

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is an office desk, that desk should include all of the necessary connections to plug in the laptop. This includes two additional monitors for a configuration of triple monitors, an extra keyboard and mouse, and the additional power plug.

As well, the firm can maintain an inventory of pooled equipment to be checked out and used for short-term client engagements. This will include equipment for audit teams, such as scanners and cellular wireless cards. The key is to make sure that staff has access to computing power that is necessary to make their jobs effective.

Computing is part of everyone's life. Therefore, the firm needs to make sure that there is proper separation between staff's use of computers for business and for personal use. The firm needs to establish policies to establish that personal software and data cannot be inserted on the business computer. This means no Quicken accounting, personal databases or iTunes music libraries.

To make sure that this is done correctly, the KAF Group requires new staff to spend their first two days on the job in training on the firm's technology applications, resources, procedures and policies. This is done to make sure that the staff can be effective from the beginning of their employment tenure.

## **STAFF INTERACTION**

Rick Richardson, long-time accounting and technology prognosticator and raconteur, talks glowingly about the future of social networking among professionals. This includes the blurring of the boundaries among wikis, blogs and communications of all kinds and lengths. It is clear that people will find ways to communicate outside the traditional water cooler conversation locations. Firms can find ways to harness this expansion of contacts by every level of staff in some advantageous way.

Using technology allows for remote access. This means that staff may not always be

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computing the way the firm wants everyone to use it.

Support of all resources has to be in place and accessible. For moderate-sized firms with fewer than 100 staff, this can be handled by as few as two people or as many as four people devoted to technical support. Initial creation of the applications and hardware infrastructure may require outside resources for evaluation and implementation assistance. The ongoing support is rarely a hardware issue. Rather, it is the expansion of the software and data usage that requires monitoring.

Firms can support technology with their own server farm or use some hosted server facility. In either event, the reality is that 21st century servers do not require the same baby-sitting that the last century's equipment required on an hourly basis. More reliable equipment, power backup resources, automatic alarms and better security all add up to 24-hour accessibility.

With remote resources, the paper file room loses significance. This means that a lot of square feet could be used for more staff space, a ping-pong table or not leased at all. Less overhead goes straight to the bottom line.

When firms decide to combine or merge, technology is one of the vital considerations. The acquired firm needs to be able to embrace the technology that is in place; it is no longer an option. This includes training and buying new equipment for staff to provide continuing consistency throughout the larger firm.

## CONCLUSION

Technology has to be an integrated and expected part of any accounting firm's operations. As Ken Kirkland believes: "Do something. If not moving forward you die." Technology provides for methods of doing business that can provide substantial benefits for the attraction and retention of staff:



- Raises the bar for work completion.

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- Allows more work to be done by fewer people.

Talented staff of every age category will not do tasks that abuse their time and ability. To grow an accounting firm requires talented people. The often asked question of, "Why use technology?" gets answered when the results of talent research are analyzed. More significantly, clients want to be handled by the best talent available.

The decision process for adapting technology within the firm requires fact-finding, analysis, evaluation, decision and implementation. It is vital to understand that the timetable between fact-finding and implementation cannot consume the careers of the staff. "Make a choice and move forward" needs to be the method to adopt because the time to find and integrate new staff is not a long interval. Candidates will not wait for eventual use of technology. Existing staff will not hang around for better technology because they will know what other firms are doing.

The use of technology is directly linked with every Life in Balance issue addressed by staff. Technology has to mean something to these people. Doing things better and more effectively has to be okay. Technology is no longer A solution; it is THE solution.

Ken Kirkland opines, "All [tax and accounting] firms should thank God that technology progression has been fast enough to save the [tax and accounting] industry."

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