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Over the past year or so, I've changed my perception of tax and accounting professionals, at least when it comes to their adaptation of technology. Once upon a time, the profession was seen as a stodgy old collection of technophobes, stuck in their old ways, refusing to even entertain the idea of doing things differently.

And while many people may still hold this stereotype, including some within the profession, I see things differently. Professionals are increasingly opening their eyes and checkbooks to new tools and practices. The notion that tax and accounting firms are much slower to adapt than other similarly sized businesses is just wrong, I think. Take a look at your own clients, for instance. How often do you need to persuade some of them to make changes that you know will be more advantageous to their productivity, but that they stubbornly resist? Technologically speaking, how would you compare your practice to your clients?

Rather than a dilemma related to any particular profession, I think it is instead one that is more related to age. I know some of the more seasoned professionals out there are very tech savvy. But when it comes to changing complete workflow processes and relying on technology for virtually every aspect of professional practice, I think it is harder for them to embrace than their mid-career and younger colleagues.

The reason, of course, is that many younger professionals have never known another way other than the digital way. And when they encounter technologies

that are at least five years old, they see it as antiquated. Now, change for

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periodically analyzing workflow processes and looking at the potential benefits that many technologies can/may provide. This can, of course, include the business side of things, like increased productivity, the ability to take on more clients, diversification of services, etc. But it can also mean more flexibility in work hours and the ability to work remotely, which can help you be equally responsive to clients (perhaps more so), while also being able to enjoy more time with family, friends or hobbies.

Chris York, a CPA in San Ramon, California, is a good example of the new generation of partners. After 17 years at a large firm, he'd grown frustrated by its inability to think outside of the processes it had used for three decades. So he started out on his own with a remarkably fresh business model that is proving quite successful. You can read more about his practice [here](#).

Conversely, I've recently spoken with the owner of a water sports retailer/outfitter who was still maintaining paper files for virtually all office and client documents. I've also recently visited with a senior federal employee who voiced agony over his department's lack of policy regarding electronic filing of documents. The first has yet to even entertain electronic document management processes, while the other has a basic system in place but with no policy or structure.

Document management isn't the only example, of course, but it is one that seemingly stretches across many business types, especially professional services firms. And there are many products on the market, which makes selecting a system even more challenging. Fortunately, our Document Management Selector tool (www.CPATechAdvisor.com/dms-survey) can offer tax and accounting firms some assistance in this area. You can also see recent reviews of these products at www.CPATechAdvisor.com/go/2410 and www.CPATechAdvisor.com/go/2354.

Workflow isn't a thing, it is everything. It includes every action of

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integration as opposed to manual data entry, or by outsourcing less profitable components that enable valuable staff to work on more lucrative engagements, or simply by reducing wasted or redundant actions.

Implementing new technologies is just the first step, and it may not always be necessary. The focal point of making positive changes in workflow processes, whether involving new programs or not, is that users must be invested in the change as much as the senior management is. In other words, enhancing workflow is about people; not only training them in new methods, but also in providing and reinforcing structure to the new way of doing things.

The great news is that greater numbers of professionals with the temperament for change are ascending into the top offices at many firms, and this will continue. This translates into a profession that will continue to embrace technological evolution.

THAT'S COOL!

On a note related to document management, I recently had the opportunity to explore a new document collaboration tool. The online WatchDox (www.watchdox.com)

system from Confidela is similar to some other document sharing options on the market, such as GoogleDocs, but with much more control and management features, along with improved security.

The user of the system uploads documents to the secure WatchDox site where it is also encrypted, and then invites those with whom he or she wants to share the documents to log into the system. Users have the ability to restrict the

access rights and capabilities of each of the invited guests, whether to view,

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When using the WatchDox system for collaboration on documents (if guests are allowed to edit them), the hosted program automatically maintains version controls that allow users to see and revert to previous versions.

Technology

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