CPA
Practice**Advisor**

It never ceases to amaze me how quickly things change in my office. And as you know, it requires a steady vigilance to stay in front of change. I spend a great deal of time evaluating the efficiency of my staff and the consistency of strategies implemented across my firm. Both of these areas must be continually analyzed in order to apply necessary improvements to keep a firm and staff operating at peak productivity and effectiveness. I want to stress that it takes *more* than technology or process implementation to accomplish this. It requires a different type of skill — the ability to develop and implement sound strategies. To provide you with a sound

example, this article focuses on my firm's paperless strategy, as well as our strategy

We'll start with the strategy for going paperless. As a profession, we have been hearing about a paperless strategy for the last decade or more, and it has continued to evolve. Initially, I viewed my paperless strategy in very simple terms — we'll stop using paper. My firm's strategy has since matured and includes the following:

- Reducing or eliminating paper files altogether.
- Collecting documents digitally from the source, instead of receiving paper and then "digitizing" documents later.
- Implementing smart technology that enables paper entering the firm to be transformed to digital immediately and effortlessly.
- Adopting a standardized file structure and naming convention for documents.
- Implementing a system to route electronic documents through the office.
- Implementing powerful tools to annotate and collate digital files.
- Adopting a system to purge documents quickly based on the firm's document retention policy.
- Adopting an online system (portals) that supports a convenient and highly secure client document delivery platform.

You can see the evolution of my firm's paperless strategy, moving from simply eliminating paper to sophisticated systems to create a true digital environment. This leads me to the next strategy — portals.

Realistically, you can't talk about a paperless strategy without, almost in the same breath, talking about a strategy for presenting and collaborating with clients online. With that said, let's take a look at what a sound portal strategy requires:

- Offering a secure, personalized portal for each existing and newly added client.
- Implementing a method for educating clients about the functionality and capabilities of the firm's portal solution.

- Adopting a portal solution that makes it easy for the firm to manage multiple

upsetting staff. You must think through all the needed pieces and parts and build a strategy to ensure success.

Now I come back to the title of this column — *New Skills Required for Taking Your Firm Digital* — to hit home the idea of the critical need for a new set of skills when going digital. I believe that firms should consider identifying a Digital Manager, if you will. You can't expect every staff member to agree on how documents should be named and filed, how to manage portals, or maintain the integrity of digital documents entering your system. Firms should consider training a staff person to oversee all of these areas. One of the most important roles of the Digital Manager would be to continually train staff on best practices and procedures while maintaining the overall system. And this doesn't have to be a new hire. It's more likely to be someone on your staff who really "gets" this stuff, can make sense of it and enjoys doing it.

My goal here is to make you aware of what I see as a need in my firm. I'm guessing that after some thought, you might discover you have this same need, as well.

Technology

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