CPA
Practice Advisor

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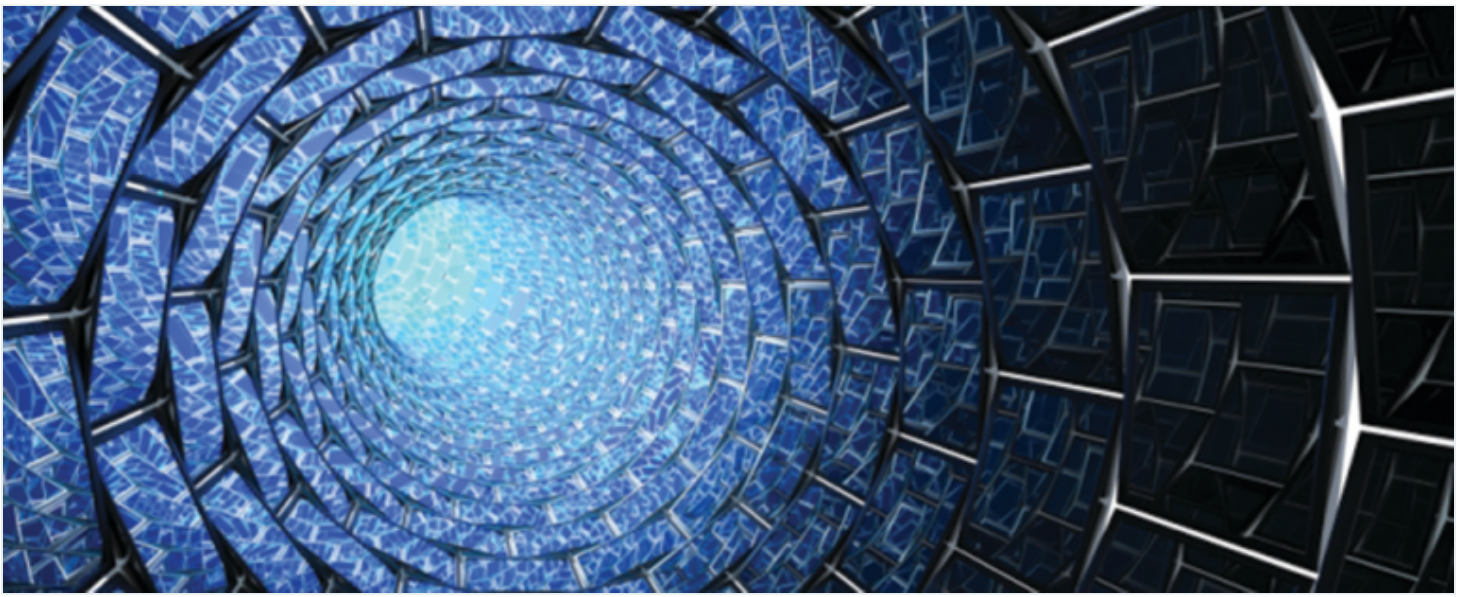
Randy Johnston • Apr. 09, 2013



From the April 2013 issue.

Over the past 20 years we have had the pleasure of assisting many firms down the paperless path. In the last five to ten years, portals have become popular.

My Network Management Group, Inc. team (NMGI) has assisted in implementations of CCH Portal, NetClient CS, ShareFile and other popular solutions. Portals are clearly a more secure way of transferring data to and from clients, but some clients just don't want to go there.

How do we manage people that we can't control? Do we simply let them do what they want? Do we try to educate them on the benefits of using the technology that can protect them? Or do we cave in in the name of client service? There is no clear answer, but you knew that before reading this article introduction.

Until proven wrong, we will maintain the position that using portals is a secure

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portal as well.

We believe it is in your firm's best interest to have your clients visiting your web site on a regular basis. Using applications provided by the firm such as accounting, payroll, bill payment or portal transfer may be reason enough for a client visit. However, we further believe that content including video postings, RSS feeds of news and other information pertinent to clients can promote return visits.

We also suggest a little humor and local flavor will help build client relationships. However, all of these actions take time. If you try to stay informed and current on professional reading, you can provide updated content for all of your web site's visitors using an RSS reader and tagging or posting items from your daily readings. Integrating all of your social media feeds, including Twitter, Facebook, LinkedIn and others will also help with SEO and traffic on your web site.

The Goal

However, the heart of the matter is doing business in the easiest way possible on your web site. If you have not found a web site developer that understands this, you may need to look for a new developer. Many of the canned web site tools won't provide the level of customization needed to make your web site "business friendly."

We suggest using a web site and marketing company like RootWorks to get unique portal capabilities with market leading tools like ShareFile, SmartVault, Bill.com, Thomson NetClient CS, CCH Portal, Intuit QuickBooks and other key practice tools. The RootWorks team will give you a professional look and feel and will also provide options to interface to a number of client friendly tools.

Another high value add of your web site can be collaborative accounting. This capability can be provided with hosted capabilities for products like QuickBooks, or

can be new generation SaaS accounting tools like Xero, Monchilla, SageOne, Wave or

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1999, you should consider allowing your clients to sign documents electronically.

This is currently not permissible for that bane of tax documents the 8879, but it certainly can work for engagement letters and other documents needed by the firm. Leading producers of software are including technologies like Adobe EchoSign, Topaz signature pads, DocuSign, Rpost or CloudX inside their products to ease the signature process.

But what if your clients refuse to use your web site and portal capability? Is there a viable alternative? We actually believe there may be using encrypted email. The offerings from CPASafeMail, Secured-Accountant, RPost, or ZixMail may provide an encrypted and safe way to transfer files from the client to the firm or vice versa. Of course, it is in the firm's best interest from a workflow and process perspective to have everything flowing through a portal.

But if a client isn't comfortable with using a portal after you have explained the benefits, then using a simple email encryption tool is at least a safe alternative. Beyond encrypted email, you'll find that providers like SmartVault and Ziptr will have alternatives that serve as a nice bridge between email and a portal. Further, look for tools that have integrated their tool into Outlook or other email software just like ShareFile and SmartVault do.

The Results

Interaction with your client should be easy and become a second nature to both team members in the firm and clients. Understanding the workflow will take training on procedures among your team members. Review your processes and make sure that you refine the processes to accommodate the new electronic transfer and filing methods.

Eliminate unnecessary steps. Think about how processing will take place when the

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extra fun? How much fun is it if all of your technology stops working for the last three days before any tax deadline? Your portal can become mission critical to your client and to the firm.

If neither portals nor email work for your firm, think about an alternate method to get the information you need from a client. There have been hundreds of articles written about Cloud Computing and the benefits of working collaboratively in the Cloud. Perhaps systems for accounting, payroll, workflow and document management could all live in the cloud. This year, we will see tools such as itDuzzit, which begin to hook these separate systems together. One thing we don't see is increased use of paper documents between clients and the firm.

One final note: for a portal to work best, it has to be integrated into your web site. If you don't have an acceptable web site, it is way past time that action needs to be taken to correct that. In the old days, we spent a lot of money on yellow page advertising. Most of us maintain our offices as a pleasant and attractive place to work and we'd be pleased to host a client at our office.

Does your web site look like a place you'd bring a client? At the risk of an inappropriate analogy, if you were trying to impress a prospective spouse, would you feel comfortable showing that person your web site?

Sometimes clients are dating you on your web site and if you don't make a great impression, they will frequently move on. Our tradition in the CPA profession is not one of marketing or stealing clients, but if an"A" type client is looking around, wouldn't you like to have your firm considered?

The Opportunity

Think about your preferred work style, your image, and the tools that you use. Get

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