fundamentals is needed. One fundamental that has been consistently problematic for all size of firms is training. Frequently the need for training is either ignored, put off, or simply done poorly. Rarely do we see training done right. Why is that?

Randy Johnston • May. 12, 2014

Most of the time in this column, discussion of the best or most promising technology tools is a primary source of interest. However, every once in a while a return to fundamentals is needed. One fundamental that has been consistently problematic for all size of firms is training. Frequently the need for training is either ignored, put off, or simply done poorly. Rarely do we see training done right. Why is that?

You need a learning program!

Derek Bok, an attorney and former President of Harvard, coined the phrase, "If you think education is expensive, try ignorance." We certainly note this issue in CPA firms and industry businesses alike. Frequently, simple tasks that are easy to accomplish in Microsoft Office or in tools from Wolters Kluwer CCH, Thomson Reuters, Intuit or CaseWare are done in a backwards and time consuming fashion. One of the largest time wasters is ineffective use of Microsoft Outlook. Properly, efficiently and quickly handling email, calendar appointments and communications with others should be convenient and fast when using this product.

Coming in at a close second is inefficient use of Microsoft Word. You may have clerical support to start or finish a document, but electronic review is frequently the easiest and fastest way to express your thinking, editing or modifications to a document. Professionals frequently believe that they "know enough" to use the tools, and become blind to the amount of time squandered and the reduction in realization caused by excessive soft and hard hours consumed.

Some content offered through free webinars and hands-on training providers is too

Excel skill such as ODBC queries. Out of the hundreds of Excel features available, there are specific Excel skills that can be applied to routine, repeatable client services. Each position and each person should have an education plan. You can request a sample learning grid by contacting the author directly.

Let's cite an alternate example with the QuickBooks desktop product. As most of you probably know, the ability to create a Chart of Accounts without account numbers is a usability feature for end-users that makes it "easier" to use QuickBooks. However, accounting professionals need and use account numbers. Some industries, such as healthcare, have recommended chart of account structures. For consistency, effectiveness and efficiency, having a consistent chart of accounts across an entire client base that can be used for any new client setup greatly simplifies the onboarding process from a firm's perspective AND the client gets the benefit of an account number structure that works effectively for their business.

Unfortunately, a significant number of professionals do not know about the easy way to clean up account numbers while preserving transactional detail in QuickBooks. This feature has been in the product for years. When questioned, accounting professionals rarely know about the feature, much less on how to use it. This becomes more of an issue when the firm creates reports or performs compilations, reviews or audits using these files because of the complications of mapping the client data to Engagement CS, CCH Engagement or CaseWare. Business tax returns can be prepared more quickly when chart of account mapping is done properly. Useful reporting and meaningful dashboards are easier to create with consistent and proper chart of account setup.

Unfortunately, every product we encounter has a learning curve. Some of us learn quickly, some more slowly. Learners have different styles. A traditional learning model (Teaching students through their individual learning styles: A practical approach. Reston, VA: Reston Publishing Company, Dunn, R, & Dunn, 1978) says that

Learning (https://www.rootworks.com/blog/2-pages/269-e-learning). CPE courses through your state society or custom on-site CPE courses are offered through K2 Enterprises (http://www.k2e.com/training/on-site-training) in addition to other worthy technology training providers. It is our belief that the money spent on good training comes back within 60 days, and continues to pay off forever.

An appropriate training strategy for IT technical staff is another concern. One of the more expensive and neglected areas of training is for upgrading your IT team's skill set. Today, having expertise in Microsoft Server 2012, Microsoft Active Directory, Microsoft SQL, VMware, Citrix, Storage Area Network maintenance, firewall and wireless configuration as well as appropriate switch setup knowledge such as trunking and segmentation would be minimal infrastructure skill sets. Having application knowledge in Microsoft Office, Adobe Acrobat, SQL Reporting Services, Mobile Device Management, PCI, and your specific applications would be a definite bonus. Sources for one-on-one in-house training include NMGI (http://www.nmgi.com/services/business-it-consulting) and for classroom training we suggest Global Knowledge.

Interacting with other technicians promotes the correct way to complete tasks, not the "book" or "test" way. Online or self-study courses are minimally effective for applicable knowledge in IT. For IT technicians, we prefer that they obtain and maintain certifications, but this does not guarantee that they can complete their tasks knowledgeably. The same applies for IT contractors. Unfortunately, unless you have good IT expertise yourself, you will not be able to discern the skill level of your internal or external IT teams.

And of course, it could almost go without saying that appropriate client service skills, phone etiquette, cross selling knowledge, security practices and general business expertise are needed by most people in a professional organization.

Be consistent

Eventually, your entire team's expertise level rises…a rising tide lifts all boats. You will find yourself in new opportunities because your entire team's skills are better and that work is getting completely more quickly, with less effort and more accurately. And isn't that a great outcome?

.

Firm Management • Technology

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.