

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

connect with you in more modern ways. Even email is taking a backseat to many of the ...

Gail Perry • Jun. 26, 2017



Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us



How do you communicate with your clients and your co-workers? If you're still relying on the telephone, you're probably finding that many of your colleagues prefer to connect with you in more modern ways. Even email is taking a backseat to many of the quicker, easier, more direct ways to send and receive messages.

Keep in mind that when the message is complicated and requires explanation and disclaimers, email and even written documents are best, and when the message requires emotion (and I don't mean emojis!), telephone and face-to-face conversations are irreplaceable. But we wanted to know what our community uses when the message is succinct and needs to be delivered immediately, or when group communication is required. Here are the responses we received:

Roman Kepczyk, CPA.CITP, CGMA, LSS-BB, Director of Consulting, Xcentric, said, Xcentric utilizes **Skype for Business** for all our meetings and we have implemented a MS/Polycom Roundtable video conferencing system which does a 360 view of those sitting around the conference table. This system allows those users to meet face to face in that office and allow the remote viewers to see them all in one 'filmstrip'

screen. The camera also highlights the person speaking in a central screen and can

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

As you'll see, **Slack** is overwhelmingly a favorite among many of our contributors. **Scott Hoppe** of Hoppe Tax said, "I write scripts so when a client uploads a file to their google drive client upload folder it messages their Slack team (similar to what zapier does except I write the code myself). So client does what they normally do and it automatically triggers events for the internal team to address." Hoppe also uses **Google Hangouts**: "Whether it is a video chat or phone call it comes from Hangouts. I can call from my desktop, laptop, browser, phone, or ipad."

Misty Megia, head of accounting programs and education at **TSheets**, is also a **Slack** and **Hangouts** fan. "My current favorite communication tool is Slack. It decreased our in office emails by over 50%!! That alone was a gift. Slack streamlines communication and creates quick conversation instead of books. You can also call people through Slack and it integrates with Google Hangouts giving you the ability to do video calling and screen sharing. (Once you hit the integration button you type: /hangouts and it takes you to a Google Hangout). On top of all of that it is searchable, you can upload videos, documents, and links so the conversation is dynamic. You have the ability to set up channels giving specific areas for conversation. Also the list of other apps Slack integrates with is incredible. It connects with my favorite task app Asana and so much more! Lastly you can also add GIFs in for that added fun when there are no words."

Arline Welty, partner at Dataquest, said, "We are fond of **HipChat**. It's part of our overall love-fest with Atlassian tools, including Confluence for beautiful online documentation. It's all integrated. They also have a very amusing library of emoticons that we use when we need to send each other cookies, Star Wars characters, and ninjas."

David Cieslak, CPA.CITP, CGMA, BSEC, Principal, Arxis Technology, recommends: "**GoToMeeting** – web based meetings and video conferencing. Principally use for client facing appts., product demonstrations and webinars). Straightforward and

reliable. **Zoom** – web based meetings and video conferencing. Easy, fast and always

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

Leslie Shiner, owner of The Shiner Group, recommends **What's App**. "I have clients in other time zones and other countries. I can text or call for free as long as they also use What's App."

Sandi Leyva, CPA, president of Accountants Accelerator recommends **Zoom** and **Wunderlist**. "We use Zoom for virtual board meetings so people can see each other via their Webcams. Most of our staff communication is done via our to-do list app, Wunderlist. It saves dozens of emails daily. I just put the task in and anything related to the task – questions, comments, notes, and files – gets posted in one place."

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.

© 2024 Firmworks, LLC. All rights reserved