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Craig Smalley • Sep. 26, 2017

I have five employees and three offices across the country, so I travel a lot during the offseason. That doesn't include all of the conventions that I attend and speak at. My wife and I travel so much that we took the extra step and signed up for TSA PreCheck at the airport.

Although I have employees, either myself, my wife, or my son, who is an intern, are

That being said, my wife and I have spent a lot of time trying to automate all of our processes. For example, for workflow we use a cloud-based software called Aero. We previously used another program, but we had to assign work to our employees monthly, and there was no way to automate it.

We do the same work for most clients each month. Most of our clients give us accountant access to their bank accounts and credit card accounts so we can pull the statements. Aero allows me to assign work to an employee and have the same job reoccur on the same day the following month. That automates the workflow process, and all I have to do is set it up once and it does what it does.

For accounting work, our clients use QuickBooks Online (QBO). We automate that process by linking the client's bank accounts and credit card accounts. The bookkeeper just needs to go into the program and accept the transactions, putting everything where it goes. Once you set that up in QBO, and the same expense comes up again, the program remembers where you put the item the first time. Eventually, you can accept all transactions at once. Reconciling the bank account iis a breeze. Because everything is being fed into QBO, when you reconcile the bank account, you simply put in the ending balance on the bank statement, and the account is reconciled.

Even my tax planning program is automated. It pulls information from QBO, and the only thing I have to manually enter is the previous year's tax return, but I only have to do that once. The program allows me to not waste time on data entry; it allows me to spend my time giving the program different scenarios to minimize my client's tax exposure. The only thing that isn't automated is that I put all of the information in a letter so my client can understand the goals we are trying to achieve.

Even the process of making an appointment with my practice is automated. My wife is a beta tester for all Microsoft products, so we get everything first. We have a link on our website that allows a client to make an appointment with us. The program is

for each client. I simply tell the tax program to send my clients a link, and they can fill out the organizer, electronically sign the engagement letter, and upload their documentation to a safe and secure place. When the client is done with the process, I receive an email telling me that they are done or need help. I honestly don't have to think about it again.

Billing used to be a nightmare. With QBO, I simply set the program to send all outstanding invoices on the days that I want them sent. When the client receives the bill, they can simply click the link, enter their credit card or banking information, and it reconciles the payment in QBO, without me having to get involved.

My hourly rate is $225 an hour. My time is best spent focusing on work that is paying me that – not on these other things that have to be done, which most business owners don't have the time to do.

My iPad talks to my iPhone, which in turn talks to my PC. I can do something on my iPad, and simply by clicking a button, it will appear on my iPhone and PC.

The point is that in order to be successful in 2017, you need to find a way to automate menial tasks.

Technology