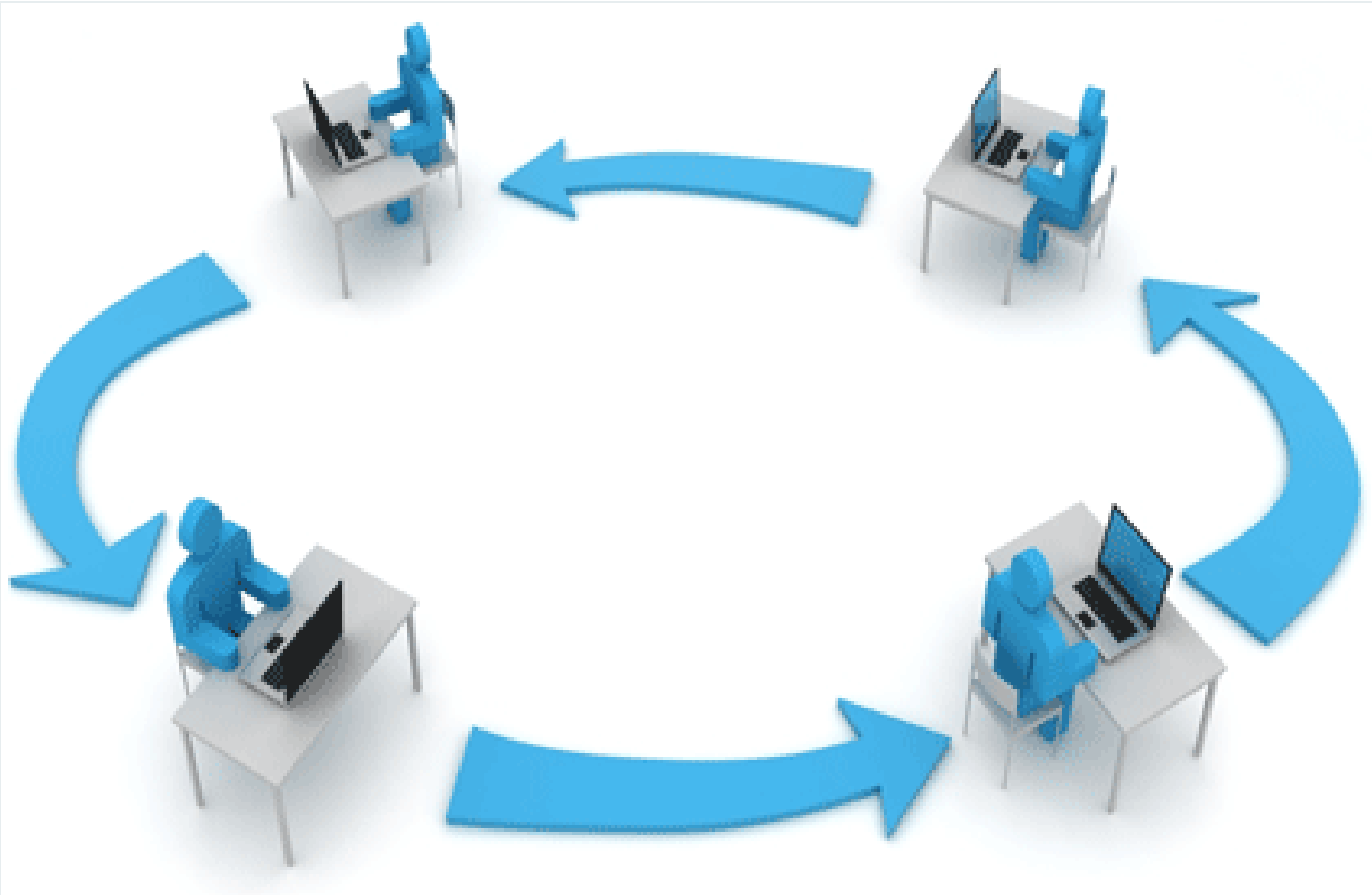
inserts many variables and decision points that must be accounted for. However, a good process and supporting toolset that gives you visibility into your workflow can ...

Jun. 29, 2018



I don't believe in the existence of a perfect process.

Why? Because change is inevitable. Nothing stays the same forever, so even if you do achieve the goal, a change will eventually affect your perfect process. And the learning curve inherent in adapting to that change will cause a kink or bottleneck to occur, rendering your process no longer perfect.

Every change we face — and we face a lot in the tax and accounting profession —

process that's causing the most problems — for example, the tax workflow for a current client.

Gather your staff (or representatives from each group involved) in a room with plenty of wall space. Start at the beginning of your process and write out a sticky note for each step of the workflow. If you have a large group, you can split them into sub-groups, have each sub-group walk through the process, and then come together to put the sticky notes onto the wall.

Once you've mapped the process, hand out two or three red, yellow, and green stickers apiece to each person in the room. Then ask everyone to put a red sticker on the area that's the biggest bottleneck/frustration, yellow stickers on areas that could use improvement, and green stickers on areas that go smoothly. If someone is passionate about a specific area, they can certainly vote with all stickers on one area.

This exercise does two important things. First, it allows everyone visibility into current processes, including those outside of their day-to-day responsibilities. Second, it highlights the most important areas that need to be addressed.

2. **Evaluate your tools:** Once you have your bottlenecks identified, it's time to evaluate the tools you're using and determine if your current toolset is sufficient for your needs. Are there gaps in your toolset that require inefficient and cumbersome manual processes?

Your toolset should allow you to centralize information and proactively monitor the status and location of work through the office. The key functionality you should be looking at is:

- Centralized, standardized client information that multiple staff can access at the same time

- Clear project location and progress status

When you work in a profession like ours where change is a constant, the processes you perfect today may change in six months. And if changes aren't addressed promptly, your staff may improvise and come up with their own process, resulting in duplication of efforts, confusion, and possibly even violation of laws or regulations.

Plan on having an official review when changes do occur, so you can update both your processes and your documentation. Identifying and fixing bottlenecks in your firm's workflow keeps things working smoothly for your staff, easing frustration and maintaining efficiency. A good review process will have the additional benefit of improving the customer service experience for your firm's clients.

———

Christie Johnston, Senior Product Manager, Firm Workflow and Administration, joined Thomson Reuters in 2002. Her primary focus at Thomson Reuters has been focused on assisting firms effectively manage their practice with tools like Practice CS and Onvio Firm Management. In her role as Product Manager, Christie utilizes the knowledge she has gained as a support lead, trainer and consultant to deliver Firm Management software specifically designed for the Tax and Accounting profession. In her spare time, Christie enjoys spending time with her family and volunteering with Girl Scouts of America.

Firm Management

Sponsors.