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**Jason Blumer** • Feb. 27, 2012



The other day, I had some important things to get into our document management system (DMS). I was on the other side of town and had to route this paperwork to other team members in my firm, get some other projects started and deliver some information to my customers. So I pulled over in an Office Depot parking lot and got

in the back seat of my car. I pulled out my leather man bag (it's not a purse!) and set

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## Proper Planning

But this setup was by design. It takes some planning to make sure I am mobile in every aspect of my business. I have committed to make sure that if my man bag is with me (it's not a purse!), then I am *at the office* no matter where I am. The value of my mobile office is one of the most important things to me. It may not be for you, so I may not suggest that you lug a heavy bag around with you, through airports and back and forth to client appointments. But I have to have it that way. Due to the design of my mobile office, I can work anywhere, anyhow and anyway I want. I can go to my physical office (which we will soon close), I can go to a coffee shop, I can fly across the country or I can stay home... all the while I am assured that I am never away from my office.

But you can't just have it that way without first planning it to be that way. You can't be mobile unless you first move to the cloud. Mobile is becoming the buzz word of late... but it assumes that you have dealt with the cloud issue first. Is your firm 100% cloud-based? You need to be if you ever want to become a mobile firm. Cloud products release mobile apps that make smart use of the cloud product. Cloud is first. Mobile comes second. That is how you must set up your firm too: go to the cloud first, then become mobile.

How can this proper planning help you to be a more effective and efficient firm? Let's explore a few scenarios together...

*What if I were in the back of my car, scanning documents and I had nowhere to put them for a few hours, or even days?*

Our DMS and client portal system (SmartVault) are cloud based so I was able to not only scan important documents, but immediately place them in our DMS for our

team members to access. **Knowledge Take Away (KTA):** speed is your friend when

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My scanned documents would probably have sat on my desktop for some time waiting for internet access until either the client or the team members in our firm asked where they were. **KTA:** create the abilities within your firm to get *knowledge* to its end point without any layovers. Any intermediary stop-overs (like a computer desktop or the corner of your physical desk) can kill your efficiency and create information log-jams.

*What if I were in the back of my car, and I wanted to pass out some To Dos to my team members but my practice management software was back on my server?*

I would probably just hold this data in my brain or on a sticky note until I can get to my software. Having our Customer Relationship Management (CRM) software (as opposed to practice management software) online allows me to quickly purge my brain of what my client just told me to pass along to one of our team members. **KTA:** the brain of the firm owner is a bad place to store data! The quicker data can leave a brain and make it to a 'To Do' on a workflow platform (we use XCM Solutions), the quicker the work can get done for the customer.

*What if I am in another city and am producing paper that my team members need to begin work for that client?*

The ability to digitize paper is a must because paper is always being generated within processes. I'm not sure businesses will ever stop creating paper, but until they do, we must be able to digitize that paper immediately to keep our cloud-based, mobile-accelerated firms moving forward. **KTA:** digitize paper as early in your processes as possible (like scanning client documents up front in your tax prep process). The earlier you scan, the earlier you can shred. And the earlier you shred in your process, the less temptation you will have to touch that paper twice. Twice-touched paper is the doom to all business processes for many reasons. Here are two: (1) it demands you

be localized near the paper itself and (2) you have to pay human labor to cart it

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you can't make that move yet. Make sure in everything you do, it is all centered around meeting the needs of the customer. If you fail to consider this, and then go cloud and mobile, you may tick a lot of people off. So don't do it right now if it's wrong for *your* customers.

So, you have to ask yourself, is going mobile really what your customers want? Why not ask them? If you are ready to go mobile, but your clients are not, then you have a decision to make: will you begin the long process of changing your client base, or will you stay behind while all other firms move to become mobile? Only you can look ahead to the future of our profession and try to innovate where your new customers will want you to be. And this bit of knowledge cannot be found in my magic man bag, which is not a purse!

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