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A colleague recently shared an amusing story with me. At a firm she worked for, an older partner refused to use email. Instead, he tasked a staff member with sending and receiving all email to and from clients on his behalf. As if that weren't bad enough, the partner insisted the staff member format all emails like letters. So even though the recipient's email address, date and subject line are naturally part of an email header, the staff member was required to type them into the body of the email as if it were a business letter.

It sounds crazy, right? Despite email being widely accepted as a means of

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technology is through ensuring that current processes are updated to provide alignment and support.

Automated workflows

Many firms have made the leap from tracking engagements with spreadsheets and paper routing sheets to automated workflow tools. But have the processes been updated to fit the new technology?

Automated workflow tools can be the single source of information a staff member needs to complete a project, including notes from the prior year and comments from the in-charge. Too often, despite having an automated workflow tool, client files are carried through the office and information is retained in multiple sources, including hand-written notes, post-its, voicemails and emails. Information is disjointed and difficult for preparers to follow and reviewers ask the same questions over again because they lack transparency into issues that were previously addressed.

Automating your workflow won't result in the time savings you're looking for unless you update your processes to ensure client information and project knowledge is contained in a centralized location to improve efficiency and collaboration.

Scheduling

Scheduling engagements is a source of frustration in many firms. Tools are now available that allow firms to automate scheduling engagements and client meetings. However, if you don't address the reasons you have scheduling issues, you're only going to automate a broken system.

Perhaps you've tried scheduling tax appointments with clients in the past, but clients arrive at their meeting without all of the information you need to complete their

return by the agreed-upon date. Or you've shown up at a client's office ready for the

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easier for clients to click on a link and electronically sign an engagement letter or tax return than to sign, print, scan, upload and return the documents.

And yet, we still see firms falling back on the excuse that "my client won't use that." Even if it were the case that your clients don't want to embrace technology, is that really the client base that will help your firm grow over the next 10 to 20 years? As a result, some members of the firm take advantage of these technologies while others refuse even to discuss them with their clients. It is important to note there are some limitations to the use of electronic signatures (including the signing of 8879s for business returns). However, success is still found with utilize this technology whenever possible. The "all or nothing" approach can lead to missed opportunities.

We've found that when firms encourage adoption of these tools, it truly does improve the client experience. But this transition starts with evaluating current processes and updating them to align with the new technology.

Increasing effectiveness

Change is hard, especially when you're dealing with changing both software and processes at the same time. It's tempting to hope that technology will solve your problems, but as long as you focus on technology without updating your processes, your firm will struggle to gain efficiency and effectiveness.

Optimal processes are ones that are consistent, efficient, and provide a high level of quality and profitability. Make sure your processes are documented and review them continually to identify and eliminate redundancy and inefficiency. Monitor results and compare them to expectations. If things aren't working out as planned, take another look at your processes and revise again if necessary. You may see some initial decreases in productivity while people re-learn their long-held habits, but if you stay the course, the real results of technology supported by process will come into view.

Remember, your firm is not the first to go through the adoption of new technology.

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