

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

in the day, and we have the choice of how we use it. While I know that's not quite true ...

Randy Johnston • Mar. 19, 2019



From the March 2019 issue.

As we approach basketball's March Madness, the quote, "If You Don't Have Time to Do It Right, When Will You Have Time to Do It Over?" comes to mind. This quote belongs to Hall of Fame basketball player/coach John Wooden. Certainly, in the CPA profession, doing things right is part of the culture. If you haven't thought about

time in a while, consider one of the sixty-six quotes from this [reference](#) by many wise

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

have benefited from learning so soon.

People frequently ask me how I get so much done in a day, and the answer for me is simple. Like Fred Rogers, I try to slow down to reflect on what is most important and focus every day on the most important things first, which to me are always people, particularly young people. Certainly, one of my biggest shortfalls is not saying “no” often enough, but whenever I say “yes” you can plan on it being so without a contract.

I reflected on sharing time management techniques with you in this column, but there are so many well-known professional resources, I concluded that was not a wise use of your time today. While I don't agree with many of the most popular authors or experts in the time management arena for several reasons, I'm going to assume that you're bringing your own style of time management to our conversation. And now it's time for several other experts to disagree with me.

While I'm a proponent of value billing, I'm not a proponent of throwing away the time sheet. While keeping track of fractional hours isn't a great use of professional time, knowing how you spend your time helps you understand the cost associated with an activity. Then you can reflect on the benefit and profit from that activity. I can readily look up the amount of time I've spent in reading and research, writing, speaking, consulting, travel, or with clients for the last 10+ years. These facts have helped me choose the things I do for both strategic and tactical reasons. For me, it is about doing the right thing all the time. While I don't think this is a function of getting older, I can't recall a time when I've seen the right thing done less than now. But I do have to remind myself that the right thing for me or my spouse or my children or my clients is not the same. Everyone decides their own “right thing.”

Finally, we choose where we invest our time. While people enjoy watching television, participating in sports, social media or many other activities, each one

takes time. If you reflect on the time investment of one activity versus another, which

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

I've gotten better through the years at estimating the right amount of time for a task, but every once in a while, I still make major errors in my estimates.

At other times I make errors in prioritizing items or choosing to do the wrong thing first, but with the daily review of the list, that doesn't happen too often. While Exchange/Outlook can help with blocking the calendar, the Outlook task list is only marginally effective at keeping track of things that need done. While an "app" will rarely make you more effective, certain apps like [Wunderlist](#), can certainly make keeping and prioritizing a list easier which is one of the best apps I've seen for this task. Other options include: [Todist](#), [Trello](#), [Things](#), [Google Keep](#), [Omnifocus](#), [Habitica](#), [Remember the Milk](#), as well as [Zoho Workerly](#), [Slack](#), [Microsoft OneNote](#) or [Evernote](#).

Remember in this area, less is more and for years, I simply used OneNote because it was one of first available and the integrations to the Microsoft Office suite proved valuable to me. Because most of us need to work with others to accomplish an engagement or project, coordination tools like Slack, Trello and other project management tools have become much more popular. Because of coordination with my [Network Management Group, Inc.](#) team, I keep my primary task list in a Professional Services Automation software tool called ConnectWise, which unfortunately won't work for many of you. On the other hand, many of you choose to use Microsoft Office 365. With the maturing of [Microsoft Teams](#), we are beginning to conclude that using Slack and other popular tools makes less sense.

In last month's column, I suggested it is best to manage your actions in a system. As a reminder, practice management solutions include: [APS](#), [STAR](#), [Practice Engine](#), [CCH Practice Management](#), [CCH Axxess Practice](#), [Thomson Reuters Practice CS](#), [TPS](#), [OfficeTools](#), [BillQuick Core](#), and other similar products which are the most popular places for CPA professionals to record and bill time. For clients, apps like [Intuit's](#)

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 many of you know, I'm from Kansas and historically have been pleased to say I'm from the "Great State of Kansas." While some public figures from Kansas as of late certainly don't represent my values, one native son certainly did: Dwight D. Eisenhower. He used the Eisenhower Decision Matrix to make decisions, noting that what is important is seldom urgent and what is urgent is seldom important. While authors like Stephen Covey may have popularized this method of decision making and time management, they certainly didn't create the technique. You'll need to ask me about my Stephen Covey story sometime... You may already be familiar with the Eisenhower Decision Matrix:

	Urgent	Not Urgent
Important	Crises, Deadlines, Problems	Relationships, Planning, Recreation
Not Important	Interruptions, Meetings, Activities	Time Wasters, Pleasant Activities, Trivia

As some time managers say: What is urgent and important? As some life managers say: what is important? Be like Ike and choose the important tasks. If you need an app for that you could choose [Eisenhower](#).

What is most valuable to you and your team members? Family? Clients? Friends? Integrity? Money? Power? This column is not trying to provide guidance in these areas, but you should consider the impact of time on the most important things to you.

We are all only given a certain amount of time on this earth, and it is probably best

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

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