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Amy Vetter • Jul. 01, 2019



A good practice for accounting firms of all sizes is to regularly assess your software choices to see if you can identify upgrades to provide a better experience for customers and increased productivity for team members. Swapping out one software for another may not feel like large-scale innovation, but it's one of the best methods you can add value to your service offerings as a small firm on a budget. If your firm is one that finds it difficult to innovate, if you feel like you're stuck in a rut, it's time to take another look at the technology you're using, or not using.

A software-driven profession

Accounting firms, like many businesses, use many different types of software to

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multiple folks pinpoint the same software as the source of their frustrations, that's probably the first place to look for alternatives. After all, the goal of technology is to make your staff's jobs easier, not harder.

Exploring your options

A mistake you can make in selecting and adopting a new software package is solely basing it on sales calls, rather thoroughly going hands-on and testing it. One piece of the process is to review software based on reviews or external opinions, however; without testing with your own clients or in your own environment, you won't realize its lacking in crucial features and functionality.

When your firm has limited time and resources, your best bet is to choose a few software solutions and either assign staff or take the time yourself to test them over a given period of time. You can budget a testing period based on the software trial periods and subscription fees you are willing to pay during that time period so you can use that time to make sure your decision is the best one possible for your firm.

Testing, internal and external

The [testing process](#) is the most important step in ensuring a software change is in fact an upgrade. A quality testing system begins with assigning dedicated staff or yourself to work with the software. You don't want team members trying to juggle their regular workload with innovation assignments. A best practice is to not only test it yourself, but test the customer support you would eventually get if you become a customer of that company. Try calling in with questions and see whether they tell you it's possible to accomplish you want with their technology or how responsive they are to your needs.

Once you have familiarized yourself with the software options, it's time to bring clients into the fold. Choose a small group of trusted clients and demo the new

software with them. Let's say you're in the market for a new reporting software.

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ride so they understand the why behind the switch, and can provide their feedback as well, so they will be on-board when you launch. Educating your team in turn allows them to explain benefits to clients.

Making the most of a change

After taking the time to thoroughly research and test options, you can make the switch with confidence and enthusiasm. If making this change improves time spent on menial tasks, it will create more time to spend as a trusted advisor with your clients, which provides new ways for you to delight your clients.

Innovation may look different when you're at a small firm compared to one with unlimited R&D resources, but it is possible on a limited budget, with the right plan.

Firm Management • Technology

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