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We live in an era of convenience, and that goes for meetings as well as everything else. There's simply no excuse to insist that everyone gather in person for a meeting, nor is there reason to be frustrated with the chaos of a conference call when too many people are on the line, like the one depicted here:

[https://www.youtube.com/watch?v=DYu\\_bGbZiiQ](https://www.youtube.com/watch?v=DYu_bGbZiiQ).

Instead, we reached out to members of our *CPA Practice Advisor* community for recommendations for their favorite meeting apps – we wanted to hear about apps for scheduling meetings as well as the meeting apps themselves. Our response was tremendous, so here is a sampling, and you can follow the URL at the bottom of the article to find more recommendations on our website. Happy 2020 meetings!!!

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**Tony Chan**, CFP®, EA, principal at [Crossroads Planning, LLC](#), uses [Calendly](#), “It is user-friendly, easy to set up and customizable.” That was just the start of the Calendly fan club. Here are several more recommendations for the app.

- **Vince Porter**, president and CEO of [Porter & Company CPAs](#), said, “I absolutely love Calendly. It’s very easy to use. It allows clients to book appointments to see me without me having to play the back and forth game of availability. It allows us to set it and forget it and clients book their own appointments.”
- **Arline Welty**, principal consultant at [DataQuest Solutions](#), said, “Oh gosh. Calendly is the best! It’s so fast and works great when integrated to Outlook. Totally does away with the long email exchanges. Also a fan of [Doodle](#) for larger groups. Even the free version is pretty useful.
- **Samantha Bowling**, CPA, CGMA, owner, [Garbelman Winslow CPAs](#), told us, “I love Calendly, it links to my Outlook and allows me to customize when I am available to meet and how many meetings I want to have in a day. Saved my life last tax season. It also allows my receptionist to book appointments without seeing the details of my calendar. I also love Zoom for virtual meetings and there is an Outlook plugin that allows me to schedule virtual meetings from my calendar. Zoom allows you to also share and view other user screens. Great for showing client’s how to fix software issues.”
- **Scott Hoppe**, CPA, principal at [Why Blu](#), agrees with the rest: “Calendly – Easiest to use UI & comes with excellent webpage integration for people to book all sorts of ways (pop up window, link, or integrated calendar). Very slick.”

And there are more – but let’s continue with some other recommendations.

**Alina Nikishina**, co-founder and program architect at [The Mastery Network](#), told us: “I like to use [Doodle](#) when I need to figure out if more than one person has availability on certain dates/times for a meeting. Doodle lets me enter-in a few dates/times as options, and then I can send out a link to all the people that need to be

in the meeting. Everyone then votes on which dates/times work for them. After

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**Megan Thomson**, CPA, CVA, CFF, at [Thomson Accounting](#), said, "Our team uses **Slack**. I really like that I can communicate with one or multiple employees at a time and we can exchange ideas quickly. We are able to organize meetings, discuss tasks we are working on, or just talk about what to have for lunch and there is no long string of work texts mixed in with my personal texts on my phone."

**Clayton Oates**, founder of [QA Business Pty Ltd.](#), said, "Its **Zoom** all the way for me. Ease of use for both us and the clients is key, the ability to easily record and distribute the meeting recording is also valuable and also the mobile app is simple to use and the outlook plugin enables you to easily schedule and manage meetings. I never see requests for meetings via Skype anymore, mostly now Zoom or Google Meetings."

**Caleb Jenkins**, EA, CQP, leader of client accounting services at [RLJ Financial](#), told us, "I use Zoom & Acuity Scheduling for my meetings:

- **Acuity Scheduling** – I love this app because I can create different meeting types (I have over 30 of them) and that allows the client to find a time on my calendar that works for them, fill out all the details that are necessary for that meeting type, and that links to my Zoom app to auto-create the meeting links on Zoom. This also allows the client to be in control of rescheduling their meeting, etc.
- **Zoom** – I also love this app because there is absolutely zero time that it takes to prepare for a meeting. Zoom allows me to share my screen and record the meetings which is a huge booster for my clients in their ability to remember our meeting details and the ability to interact with me more closely around the data that I'm presenting. Zoom is the closest thing to an in-person meeting as possible without requiring the client to drive to our office and it is still completely personal."

**Sandra Wiley**, president of [Boomer Consulting, Inc.](#), said, "We LOVE [Box.com – Box Notes](#). Box Notes allows everyone to collaborate on the agenda, as well as add notes during the meeting at the same time. It has been a game changer for us. We use Zoom

for all of our meetings. Great for seeing each other, screen sharing and ease of use.

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sharing. One of my favorite hidden features is the ability to share an iPhone or iPad screen right through the zoom interface. Recently, Zoom introduced a virtual background option that is 95% perfect even with no green screen. Once you use it, you will never look back.”

**Randy Johnston**, executive vice president at [K2 Enterprises](#), recommends [Bookings](#). “This is included at no charge in Office 365, integrates to Exchange/Outlook and allows you to set rates/charges for meetings, if desired.”

**Joy Lutz**, CPA, founder of [Aligned CPA, LLC](#), recommends using [Google Docs](#). “We find it imperative to lead every meeting with an agenda. We use Google Docs to prepare and share the agenda before our meetings so everyone knows what to expect.”

**Angie Grissom**, president, [The Rainmaker Companies](#), said, “My team loves [Doodle](#)! It’s free (and also has a paid version if you want to get rid of advertisements), easy to use and our clients love it. It gets rid of the 40 emails of back and forth to schedule a call!” In addition, she recommends [Cvent](#). “This is the most comprehensive of the meeting planning apps at this time. The ability to have materials, maps, attendee and exhibitor list, social media interactions and more make it particularly attractive. Further, integration with travel service providers is a benefit, too. The downside is the cost.”

**Jackie Meyer**, CPA, CTC, CTS, CEO/Founder, [Meyer Tax](#), [The Concierge CPA](#) told us, “An amazing new app I’ve started using is [Otter.ai](#) for automated meeting notes. It records anything said verbally through the computer’s microphone, no matter what meeting platform, and transcribes it in real time. Saves a lot of time summarizing and saving details. A second new app I have to mention is [Crystal Knows](#). If you want to understand your meeting participant’s personality type and best communication

style, use Crystal. It will analyze their LinkedIn profile, add their DISC type, then

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value on networking. Brella lets others at the same event see who is there and request a brief meeting. If the other person accepts the invitation, Brella automatically schedules the meeting location (usually a table somewhere at the event venue). I've found it invaluable to meet high potential contacts at conferences and events."

**Roman Kepczyk**, director of firm technology strategy at [Right Networks](#), told us that, "Doodle is great for scheduling meetings and finding everyone's availability, and it automates reminders."

**Donny Shimamoto**, CPA, CITP, CGMA, managing director of [Intraprise TechKnowlogies LLC](#), is also a fan of Doodle, "for figuring out when to meet since it makes it easy to present options and quickly assess those options where we can maximize attendance." He also recommends, "Zoom for actual meetings, as it seems to have the least amount of issues with people getting into the meeting. The mobile app is a pretty seamless user experience too."

**Ingrid Edstrom**, priestess of profits at [Polymath, LLC](#), said, "I love Zoom for my client meetings. The tools are intuitive, high quality, and great for both meetings and webinars. I particularly love the ease of the integration with Google calendar, as it makes it so easy to include a meeting link on any calendar invitation."

**Garrett Wagner**, CPA, CITP, founder/CEO of [C3 Evolution Group](#), is also on Team Zoom. "Zoom – Hands down the one and only go-to app for meetings. It doesn't matter if it is audio or video or both, it's the only meeting app I use."

**Michael Barton**, CPA, partner at [Petrow Kane Leemhuis, PC](#), agrees. "For my AICPA meetings and also client meetings I utilize Zoom. It helps keep that face-to-face interaction for a big group while not making it complicated to get setup. I utilize it for all long-distance client relationships as well."



**Kevin Bong**, founder at [AuditFile](#), said, “I like **Zoom** for screenshare web meetings. I

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**Melissa Galasso**, founder and CEO at [Galasso Learning Solutions](#), said, “I’m a big fan of the **Zoom** app. It allows me to schedule meetings and take them from everywhere without needing my laptop. The ability to see the attendees and see a shared screen works just as well on the app as it does on the website. As a frequent traveler, this is my go-to on the road app to have the most efficient meetings.”

**Amy Vetter**, CEO, The [B3 Method Institute](#), uses **Calendly** for organizing. “It has saved so much time from going back and forth on email trying to find a time to meet to making it easy for someone to find a time based on available.”

**Susan Coffey**, CPA, CGMA, executive vice president – public practice at [AICPA](#), had a different take on meetings to share with our audience. “While I don’t use meeting apps, I do search for ways to lighten up the day during breaks – *particularly* when meeting virtually. See this link for some interesting ideas:

<https://www.meetingsnet.com/fb/15-ways-power-your-meeting-breaks>. I’ve done trivia during breaks. I’ve done rebus puzzles during breaks. I’ve done music during breaks. I’ve asked people to submit pictures of something from their childhood bedroom that makes them happy/smile, and asked meeting participants to ‘guess who.’ What I’ve found is that things like this help people get to know each other better, creates comradery to solve common issues, and gets them back to the meeting on time (to manage the meeting better).”

**Jacquelyn Tracy**, CPA, CGMA, partner at [Mandel & Tracy, LLC](#), said, “I am old school and like **Outlook** for scheduling meetings. This way, I can ensure that it is on everyone’s calendar. I can include any instructions, notes and even attach the agenda. I use it for business, personal and my volunteer work. If it’s not on the calendar, it just won’t get done!”

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great way to be able to quickly let a partner know if we have a resource available and it's far easier than sending numerous emails back and forth or trying to assume someone remembers to put 'carpool pickup' on their Outlook calendar. As far as scheduling a meeting with a group, I love **Doodle** – it's simple to quickly set up the open choices on the calendar & allows each participant to select multiple options that will work for them. When you're trying to get time from external individuals, this can be a lifesaver and save a huge amount of wasted time going back & forth on emails."

**Tom Hood**, CPA, CITP, CGMA, CEO at [Maryland Association of CPAs](#), uses three tools for organizing meetings:

- **Zoom** for visual communication – easy to run and use and you can record for disseminating what you talked about
- **Asana** for project management of events – transparent and works with all of your major internal apps – email, calendar shared docs, Slack, etc.
- **Calendy** for trying to schedule groups – ease of use and links to current web-based calendars (Google, Microsoft, etc.)

**Joshua Lance**, CPA, CGMA, managing director of [Lance CPA Group](#), told us, "For getting a group of people to figure out a common meeting time, I use **Doodle**. It's a great app to gauge availability and pick a time that works for everyone without a bunch of back and forth emails. For setting up meetings with clients, I use **Hubspot's Meeting** module to provide a link to my client and they can book a time directly on my calendar. It also sends a calendar invite with a link to a **Google Meet** meeting and an automatic reminder email the day before the meeting."

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