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to survey members of the CPA Practice Advisor community to find out what apps they are using to make working from home more effective.

Apr. 16, 2020



Since so many of us are now working from home, we thought it would be appropriate to survey members of the *CPA Practice Advisor* community to find out what apps they are using to make working from home more effective.

Earlier this year we covered [meeting and calendar apps](#), and many of our readers agree that those apps are helping them manage their businesses from outside the office, so you might want to start there. And then, we hope that some of these suggestions will be useful to you.

**Sandra Wiley**, president of Boomer Consulting, offered several suggestions:

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projects. □

- **WhatsApp** and **Facetime**: So I can still socialize while giving everyone their Physical Distancing!

**Randy Johnston**, executive vice president at K2 Enterprises and CEO/founder of Network Management Group, Inc., also presented us with an array of suggestions:

Proper Pandemic Preparedness planning would have had these tools in place:

1. Remote access with **Citrix**
2. VOIP system with either hardware handsets or softphone software
3. MFA – Cisco DUO
4. Office 365, using **Teams**
5. Workflow software to coordinate among team members

In effect, with proper planning, full remote access with security should have been in place.

- For those who had not planned for the pandemic environment and desire interaction, I recommend **Seesaw**. This tool is far better for remote instruction than the traditional Zoom, GoToWebinar tool in areas like dance or the arts.
- For professional webinars that need interaction, you can use **ON24**. However, one of the best tools available right now is from **Refined Training** from Refined Data, which enhances Adobe Connect.
- A tool that is very helpful in this new virtual world is the **TechSmith Bundle**, which has both Camtasia and SnagIt. I think these products are mandatory for non-graphics professionals to produce higher quality webcasts and graphics.

**Jackie Meyer**, CPA, CTS, CTC, CEO and founder at Meyer Tax, said, “**Instant messenger** is the end all app for working from home. It helps the team stay

connected, have comradery, brainstorm, be thankful, and communicate information

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for silent meditation and thousands of guided meditations that help with anxiety, stress, relaxation, sleep and more. I think we could all use some support with this these days!

- **Down Dog** – They have some awesome yoga and work-out apps that I love – Yoga, HIIT, Barre and 7 Minute Workouts. You can customize your workout based on skill level, intensity, focus areas, duration and more. An added bonus: they're offering free access to everyone until May 1st so you can stay healthy and well!

**Megan Lewczyk**, CPA, said, “One of my clients, **Beech Valley Solutions**, is a tech-enabled staffing firm platform that specializes in remote and gig work, and now that's more important than ever. Businesses need advice and may not know where to look for the best accounting, finance, or IT professional. There are projects and needs that businesses didn't even imagine would be a concern a month ago. Beech Valley is a great resource during this very uncertain time and can match people quickly.”

**Garret Wagner**, CPA, CITP, founder/CEO of C3 Evolution group, tells us, “My most used app right now is **YouTube**: for some working from home break and a little mid-day entertainment.”

**Brian Friedman**, director at EisnerAmper, said, “I love **Twitter**. It's my news and entertainment all wrapped into one that provides me an up to the second pulse on the things that matter to me.”

**Rick Telberg**, president and CEO of CPA Trendlines Research and Bay Street Group, LLC, recommends using **Alexa**: “She makes a great secretary, reminding me of appointments and to-do items. And she has a some really bad jokes. Say, ‘Alexa, tell me an accountant joke,’ or, ‘Alexa, tell me a lawyer joke.’

**Stacy Kildal**, owner of Kildal Services, LLC, uses **Upwords 2** for break time: “Back in the mid 2000s, my best friend and I played Email Upwords. It was amazing, but alas!

they shut down the server. Behold – we now have Upwords 2 for mobile! Available

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**Caleb Jenkins**, leader of client accounting services at RLJ Financial Services, Inc., shared these apps:

- **Breaking Headlines: Apple News** gives a great assortment of the breaking headlines.
- **Music: Spotify** gives the ability to play my predefined playlists of music.
- **Food Delivery: DoorDash** gives me the ability to schedule delivery of my meals.
- **Focus: StayFocusd** gives me the ability to set time limits on various websites in order to get work done.
- **Finances: Apple Card** to manage personal spending.

**Doug Sleeter**, founder of Sleeter Consulting, wants to remind us to check out **Zoho Remotely** – all of its tools for working remotely are free to small businesses until July 2020.

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