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**Randy Johnston** • May. 12, 2020



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In these challenging times of pandemics and work-at-home, tools to manage the practice, team members, and workload help. Most firms report that advisory work has currently exploded while helping clients manage cash flow, apply for SBA and PPP loans, and dealing with the extraordinary move of changing the April 15 tax deadline to July 15. Coping with the COVID-19 pandemic will be the trigger event that shows how our firms can work in the “new normal.”

As our firms adjust to extraordinary client demand and the changing regulatory

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all of their systems, communications, and support. On the other hand, partners discovered that work at home sometimes meant “not work” work at home. Team members who were self-starters continued to produce and, in many cases, had more work than ever to do. Other team members discovered ways to game the system, such as logging in, answering a few emails, and then heading off to take a shower or have breakfast before returning to their computer.

Additionally, some team members found that their home was ineffective to accommodate work-at-home. They didn't have a comfortable chair to use for an eight- or sixteen-hour day. The kids and the dogs made too much noise to have a business call undistracted. Getting by on a smaller monitor at home didn't work when this became the full-time setup. And the spare bedroom, basement, or closet wasn't as effective as a home office, without desk space and all the tools of the trade. Even managing small entrepreneurial businesses from home requires the right tools, as noted in my article <https://www.k2e.com/articles/starting-online-shop/>. Indeed, we have learned the deficiencies of our work-at-home setup. Perhaps there are tools from the past we don't need anymore like calculators or phones, but probably not.

A few apparent changes will occur. **First**, retirements that were imminent because of the healthy stock markets will be delayed. Postponing retirements will alleviate some of the immediate need for staffing. Unfortunately, some firms have made plans to furlough team members as soon as they can plan their future workloads. Some firms have reduced partner draws. Other firms have increased client service and billings at this time, keeping their clients and their firm ready for when the business climate improves. Appropriate staffing will continue to be a practice management issue.

**Second**, work-at-home is likely to become the “new normal.” While there had been a trend to more remote working, work-at-home was more of the exception than the rule for most CPA firms. The pandemic stay at home orders forced firms to work-at-

home and proved that this does work. Maintaining the culture of the firm for the

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adjusted. VOIP, video meeting tools, and many others suffered under load. During the early conversion to the work-at-home environments, most remote systems that I used had failures of one kind or another. However, the management and IT teams at these companies responded and addressed most issues within a couple of weeks.

**Fifth**, there are likely to be systemic changes. For example, many practices proved that they could work-at-home effectively. So, will the need for expensive real estate and fancy offices drop? Can we mostly eliminate the 30- to 90-minute commutes that many have routinely been making? Do our expenses drop when we don't have to sit in traffic and pay for fuel?

### **And What Tools Help Us Manage This New Practice?**

**Practice Management systems** that have workflow capabilities, billing, scheduling, electronic payment, portals, and integrations into our document management system, tax, and A&A tools would be best. Whether your firm does value billing or bills by the hour or project, you still need to get the invoices out and get paid in a timely fashion. While there are useful practice management tools for smaller firms such as **Accounting Power**, **OfficeTools**, **Clarity Practice Management**, and **TPS Cloud Axis**, new competitors such as **Canopy**, **Karbon**, and **Pascal Workflow** are trying to break into the market. Products for larger firms like **CCH Axxess Practice**, **Onvio Firm Management**, **Practice Engine**, or **STAR** are all quite aware of the need for managing remote and work-at-home professionals.

But **Practice Management software** is only part of what is needed to manage a remote or work-at-home group of professionals. Other remote tools should include:

- **Productivity software** with **Microsoft 365 (formerly Office)**, **Zoho One**, or **G Suite**
- **Phone support** with voice over IP (VOIP) from providers like **Vantage Unified Communications**

- Video meetings with [Google Hangouts](#), [GoToMeeting](#), [WebEx](#), [Zoho Meeting](#), or

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effectively serve clients if they work from home? Are you providing the right tools with the proper education? Have you planned expertly for all the remote tools listed above? Have you focused on your client and team member experience? How do you and your partners manage people effectively when you can't walk down the hall, or you don't have a partner in charge of an office location?

Visibility in your Practice Management system, combined with effective document management and workflows, are the keys to practical remote work. Yes, we'll still have issues managing things like due dates and scheduling teams for engagements. Flaws in your practice management, document management, workflow, portals, and other tools became evident during the stay at home orders. But if you can't get the bills out and get paid, how would your firm stay around to continue to help clients?

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