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FIRM MANAGEMENT

Prioritizing Modern Data and Client Service in a Digital Environment

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The term digital transformation has been around for decades now. It's driven the way companies grow, and hindered business survival in other cases, but it's never felt as real as it has this year. All industries are being challenged by a digital pace like no other and ours is no exception. For many of us, it's brought on the accelerated adoption of trends that were already being explored prior to the pandemic. Others have been challenged by high-pressure decision making and unprecedented pivots at incredible speeds.

As CPA firms, we can all agree that in the midst of continuing uncertainty, client communication and service remain at the top of our priority list. Remote client service is not a new phenomenon – most accounting firms have long been well versed in forging client relationships from afar. What has changed is the monumental shift in the way our internal environments function – specifically, the data speed and management we rely on to keep daily operations afloat. The good news is, innovations in infrastructure technologies have made it simpler, faster and more economically advantageous to do so.

The Remote Office

When lockdowns first went into place earlier this year, there was a rapid, global shift to remote work wherever it was possible. It happened immediately, whether businesses already had the technology in place to facilitate remote employees or had to start from scratch. Now that we've had some time to reflect and prepare for an extended Covid-driven world in 2021, there are a few key elements you should consider (if you haven't already) to set your firm up for success and ensure neither client service nor employee support is compromised.

- *Incorporate a seamless conferencing and telecom system.* Specifically, consider implementing a mobile enterprise system so employees can differentiate personal calls from business calls and to ensure fluid communication.
- *Determine whether your remote environment is short-term or long-term.* While we don't know what the future holds, now is the time to consider these circumstances as a means to reimagine your company capabilities. Investment in digital infrastructure may be the more valuable investment than planning for a return to physical offices.
- *Modernize your data.* Invest in data management and technology that enables seamless and secure remote employee onboarding. At a time when your employee and client network is stretched further than usual, consider making the shift to flash data storage – real time data makes a significant difference in operations.

Supporting a Digital Environment

Making the shift to flash is not a daunting task in today's environment. In fact, you may experience an immediate and seamless improvement to your operations, at essentially the same spend, and depending upon your vendor – scalability. The reality is employees need to be able to rely on secure, real-time data to effectively service clients in a fully remote capacity. As you can imagine, we have a strict criterion when it comes to our technology vendor selection and so should you. Here's how we approach these important decisions:

- *First, evaluate your data model.* Is most of your data used for daily operations? If so, flash is likely a worthy investment.
- *Identify a partner that fits your model and addresses improvement areas.* There are numerous partners out there, but when you find ones that align with you like we did with Pure Storage and Involta, it will make all the difference. For example, Pure Storage's FlashArray was a great fit for us because it consolidated high-capacity workloads and delivers simplified data and analytics.
- *Prioritize reliable data storage.* In many use cases, keeping data centralized cuts down on user end points, ultimately providing a more seamless and secure data environment.

Looking Ahead

Twenty years ago we tackled the shift to paperless initiatives, and as we look into the future, more disruption awaits, with new advancements in AI poised to redefine our roles right around the corner. As you prepare for the next digital shift, it's important to assess the question: what can your business do more effectively in a digital capacity? The key to a successful digital transformation is one that addresses core business operations, such as data speed and client communications, and provides long-term solutions that far outlive the pandemic.

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