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Belonging

Every seasoned accountant has been there: feeling stretched too thin after an unforgiving busy season and eager to put it in the past.

Jeannie Ruesch • Apr. 22, 2021



Every seasoned accountant has been there: feeling stretched too thin after an unforgiving busy season and eager to put it in the past.

As they eye the light at the end of the long, never ending tunnel that has been this year's busy season (made darker by tall, structurally unsound piles of receipts), they're probably looking forward to spring cleaning their to-do lists and getting

their lives back in order...and probably *not* looking forward to doing it all over again

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complicated tax policy changes (we won't even mention PPP loans...) on top of their usual workload. But 'more' is not always better.

In fact, the secret (and there is a secret!) to surviving busy season lies in doing less – or, rather, leaving behind certain outdated practices. Accountants with less on their plate, after all, can spend less time and energy on arduous busywork...and more time providing the high-value strategic consultation and support their clients want and need most.

So, how can you do more with less? **Here are four outdated practices accountants should leave behind in busy seasons to come:**

Managing Manual Data Entry

Automation is sometimes treated like a threat, especially in industries like accounting that might have a reputation for being averse to change. However, it's important to keep in mind that elevation is the goal here – not replacement. Just as there are things a computer can do that a human worker cannot, there are uniquely human issues that technology can't solve.

Technology can't replace accountants, but it can reduce their time spent on things like data entry (or worse, double data entry) which, in addition to eating up irreplaceable time, opens the door to errors or even, in rare cases, fraud. Accountants should make it a priority to integrate software or bots that can automatically read data from invoices, spreadsheets, and PDFs. Doing so will streamline workflows during the busy season and year-round.

Reviewing the Shoebox of Receipts

It's every accountant's worst nightmare: having to sift through a massive pile of unorganized paper receipts, invoices and forms at the eleventh hour.

Using automation year-round to tackle things like bill pay and managing approvals

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What accountants need is an integrated cloud dashboard with the ability to safely store and retrieve all client documents, vendor records and time-stamped transactions. A single, accurate record of the truth saves time and provides an added layer of security that ensures both practical and peace-of-mind benefits.

For instance, cloud-based accounting means that client and business data is both protected and accessible in case of an emergency – such as a [natural disaster](#) or an [unprecedented pandemic](#) that necessitates entire companies work from home.

Ignoring the Human Element

2020 was a unique year where many accountants stepped up into additional roles as business advisors and occasionally even therapists for their clients. With the right support system—including the right team, tools and technology—they can focus more time on adding that human touch to their role and less time on repetitive manual tasks and worrying about mistakes.

Increased automation can remove data entry and the need to chase paper and instead allow accountants to shift their focus toward more forward-looking services instead. This will improve data entry accuracy and help reduce the liability risk (not to mention rescue countless sets of eyes from squinting at ledgers, reviewing receipts and analyzing handwriting every day), and even benefit employee retention, morale and engagement.

It's not surprising that accountants are feeling burned out after this busy season. (After all, even the IRS is dealing with a more-massive-than-usual backlog of tax returns and correspondence.) However, that doesn't mean that the industry should accept exhaustion as the status quo when so many options are out there.

Investing in the right technology and automated solutions—as well as the

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