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Mary Girsch-Bock • Feb. 24, 2022



Unless you're working in a silo, it requires a true team effort to effectively manage your accounting firm. One of the keys to a smooth-running CPA firm, like any business, depends largely on the people you invite into your firm.

Hire the right staff

Whether you're hiring a partner, potential partner, manager, bookkeeper, clerk, or

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If your firm is run as a team, and doesn't just use the term casually, part of being a team is listening to the thoughts and opinions of others. Disregarding the input of others shows a lack of respect, as does ignoring pressing issues brought to your attention. For example, your HR person comes to you with an issue in the middle of tax season. Disregarding the issue until you have time to deal with it displays a lack of respect for your employee and the issue that was brought to your attention. There's no better way to end up with a staff shortage than to treat staff and colleagues as dispensable.

Redefine what 'Partner' means

Being a partner in a CPA firm might be the goal of an accountant taking the first job in an accounting firm. Of course, being a partner carries all sorts of responsibilities. When creating partnership roles at your firm, be sure to have those roles clearly defined so that those who are considering partnership will have a clear path to follow.

And be sure to note that becoming a partner is not an 'in name only' concept, but requires continued work, albeit on a different level.

Stop micromanagement

If you're committed to hiring the best, then why are you or your colleagues micromanaging them? Instead, concentrate on what you do best, and delegate the rest to your staff. Remember, as senior management or partner, your job is to focus on innovation, not administrative duties. If you take the required time to find good matches for your firm, you can sit back and give them the freedom to do their jobs.

Get a handle on time management

Getting and staying organized can help keep your desk clutter-free, and allow you to

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While being organized is important, that doesn't mean that the doors to innovation should be permanently closed. Maybe a staff member or colleague does have a better way to do things. Creating processes and procedures is helpful for new staff members and helps maintain efficiency, but always keep the door open for improvement.

Stay up-to-date on technology

You don't have to implement every single technology invention that is directed at accountants. However, ignoring the latest technology in favor of "we've always done it this way" does your firm and your clients a grave disservice. Take the time to implement what works best for your firm and disregard the rest.

Firm management techniques will vary, based on the size of the firm, the number of employees, and the number of clients. However, following these suggestions can be helpful whether you're managing a firm of five or fifty.

Firm Management • Technology

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