CPA
Practice Advisor

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Brian Tankersley • Jun. 19, 2022



One of my personal goals this year is to increase the amount of automation I use in my work so that technology is working for me instead of me working to maintain the technology. I've used cloud-based accounting packages along with Receipt Bank,

1Tap Receipts, and bank rules/bank feeds to reduce the data entry in my accounting

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subscription worked together. I'm now about three months into my adoption of Zoho One, and so far, I've implemented Zoho Social (social media management), Zoho CRM, Zoho Campaigns (marketing), Zoho Meeting (replacement for WebEx/GoToMeeting for meetings and webinars), and Zoho Reports. By the end of 2018, I expect to implement Zoho Subscriptions, Zoho Survey, Zoho Creator (mobile app tool), Zoho Sign (e-signature), and Zoho Flow (data flow automation – think "digital plumbing"), and I will be much more automated than I have been in the past.

The reason data integration tools like Zoho Flow and digital plumbing apps like Zapier, IFTTT, and Microsoft Flow are necessary is that most of us have dozens of apps we use, all with separate data stores which do not integrate. While it doesn't take that long to key in data a second time, it's the way we lose our day – it's not the half hour we take for lunch, but rather, it's the 200 items of double-entry which each take 20 seconds throughout the day (which totals well over an hour of wasted time).

I've spent a couple of days in the last two weeks working on learning how to create forms, mail-merge e-mails, social media integration with CRM, and drip-marketing campaigns in Zoho, and it has been nothing short of amazing. I first set up an e-mail list for my website, CPATechBlog.com, and worked on creating a form which I could embed in my WordPress website. I completed it a couple of weeks ago, and already have a few subscribers. The Zoho Campaigns tool handles all the list management issues – who opened it, who clicked on something, whose e-mail address bounced, as well as handling the recipients' consent to receive messages from me.

After I mastered setting up a list, I moved on to creating an autoresponder which instantly responds to requests for a document entered on my website. It took a while to get the autoresponder to work properly – but now you can request documents/files from me without me having to ever attach them to a message to you – and you can

receive them 24 hours a day. These forms and e-mail responses can be used in

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creating a lot of value and making them more effective at working with clients – which is what public accounting is about.

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