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FIRM MANAGEMENT

4 Steps to Successfully Implement and Manage Change in the Workplace

Even with the most adaptable of employees, change management takes time, dedication and, above all, repetition.

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By Clayton Crouch and Carla Caldwell.

As human beings, it's natural to be averse to change. So it's no surprise that when you introduce new initiatives in the workplace, it can often become a battle for time, attention, and buy-in from employees.

Whether it's starting a workflow, introducing technology or migrating your business to the cloud, inertia often gets in the way of successfully implementing a new routine. This is especially true during tax season, when even the most structured practices have to prioritize urgent tasks that leave no time for new initiatives.

Despite these challenges, change is necessary to stay competitive and efficient, especially as new technologies continue to emerge. Here are four management tips for change that can help you successfully adopt new tools and help your firm thrive.

It's Not Just Another New Initiative

When thinking about communicating an upcoming change to employees, it's crucial to start by establishing *why* the change is important in the first place. You want to differentiate the initiative from other optional activities that can be disregarded. This

way, your entire firm can embrace the new program despite their busy days and deadlines.

The easiest and most important way to do this is through messaging. If you're rolling out a new technology, for example, make sure to reiterate its potential impacts in all meetings, not just those that are specifically about the tool. You want everyone involved in the process, so position this technology as a priority whenever possible so it permeates your firm's identity.

At smaller practices, it's important when establishing a change not to take your foot off the gas because you think "everyone knows" about upcoming adjustments. At larger firms, you'll want to bring in key players to help you disseminate the information to the full team.

Identify The Owner

From start to finish, all successful initiatives need a distinct owner who can lead the change with authority within your firm.

Whether it's a new policy or an application that's being installed on work devices, you need someone to be the face of the operation. Look for someone who can learn the ins-and-outs of the subject matter, understands the resources available and makes the best decisions for when, where and how to implement change.

This person should become synonymous with the initiative, and be prepared to act as a liaison between employees, management, and any third party vendors involved. Over time, they can coach fellow employees to create redundancy for the times they are unavailable.

Accept The Hiccups

Just because your initiative is being prioritized and you have a dedicated owner doesn't mean problems won't arise along the way.

The reality is that with any change will have hiccups that were not anticipated, and responding to them promptly is another piece of change management. During these times, remember that not everything is going to be done exactly the way you would do it and that even with specific processes in place, everyone does things differently.

There will always be pitfalls throughout any project, so make sure to schedule check-ins to make sure that all necessary parties are communicating and empower your

project owner to have the authority and tools to address each situation individually.

Celebrate Achievements Along the Way

One of the most overlooked pieces of successful change management is the importance of celebrating your wins.

As accounting practitioners, it's often "off we go" when moving onto the next step of a project. As busy people, it's easy to forget to celebrate achievements and recognize the individuals who contributed to a new service or application. But taking a moment to be thankful and express gratitude for the work is key to keeping spirits high and the ball rolling.

Not everyone needs to give a speech at every milestone, but remember to stop and celebrate what the team has accomplished.

Integrating New Ideas

Even with the most adaptable of employees, change management takes time, dedication and, above all, repetition. As technology changes along with staffing and the rise of remote work, these skills will benefit firms of all shapes and sizes.

It takes practice, but approaching change as a positive force rather than an insurmountable task will ultimately lead to more efficiency and better outcomes for your employees, clients, and practice.

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