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do how to improve client and firm experience. How can you adjust your firm's capacity?

Randy Johnston • Nov. 09, 2022



A Top Technology Article – November 2022.

Finally, another tax extension season, and most deadlines are behind us. It is now that many of us make the changes to prepare for next year. In other columns, I have discussed [strategic planning](#) or [your needs](#), but for the moment, I'd like you to think tactically.

What issues have you and your team dealt with or worked around in the last few months that you can work on over the next few weeks and months? What can you do

now to improve client and firm experience? How can you adjust your firm's capacity?

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Notability, or **others**, get ready to use the place where you warehouse your ideas.

First, please stop and write down the top issues you are dealing with now and in the past few months. I wasn't kidding! How many are on your list? You didn't stop to make a list? Take the time now to come up with items in your firm, your life, your clients, or anywhere else that needs your attention. Then, before you stop making that list, take one last look at the items for your firm, your life, and your team. Did you get them all?

It is nice to have you back from making your list. Second, take the time to sort these in priority order. If you put the issues needing attention on paper or in your head, that may take more or less time, but if they are in any electronic format, sort them out. I'll wait for you to do that.

Are you done? Excellent! Now add a few characteristics to each item. If you made your list in Excel, you'd get a bit of an advantage here because you'll add just a few more columns. I believe it is best to estimate 1) the amount of time needed, 2) how much it will cost, 3) others to have involved, and 4) when you would like this done. You may use these attributes to help with 1) blocking the calendar to allocate the time to complete items, 2) making sure you have enough money, 3) delegating or collaborating, and 4) setting timeframe goals. I hope you have time to get everything done before the holidays. But there is no time like the present to get things done.

What ideas can you give me?

You know that I always like to have you start with a strategic and technology plan, but that's not the goal of this article. Further, this may not be the time to select a new technology tool. Instead, it is time to identify what you can do NOW to improve things. We must buy time to solve other issues by eliminating the time wasters and working on the highest priority items first.

Your list is way more important than my list or any other bright light idea to follow.

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[Taxfyle](#) or [Xpitax](#)

2. **Ease of client document exchange** – if you can't quickly get the supporting documents you need for projects from your PBC (prepared by the client) list from your clients, consider tools like [Liscio](#), [SmartVault](#), [Suralink](#), or [e-Courier](#)
3. **Quote to Cash (collection or proposals to engagement to a completed project to billed work to money in the bank)** – many firms are struggling with this entire cycle. While work has been plentiful, the steps to get this done easily have been too painful. Look at what is causing the issue in your firm and try to address it. It may take a holistic view to solve correctly, but perhaps a few band-aids, for now, will overcome most of the issues. While you can apply many solutions in this process if the problem is
 1. For engagement letters, try [Knuula](#)
 2. For workflow or project management, try [Clarity Practice Management](#), [CCH Axcess Workflow](#), [Doc-It Suite Cloud](#), [TPS Cloud Axis](#), or [Jetpack Workflow](#)
 3. Too much keying of data, try [Dext](#), [Hubdoc](#), or [Sage Autoentry](#)
 4. Too much time in trial balance to tax or client accounting to tax, try [Tallyfor](#)
 5. For getting paid, try [CPACharge](#), or [QuickFee](#)
4. **For paying bills**, try [Corpay One](#)
5. **For technical support issues**, try [Ace Cloud Hosting](#), [CETROM](#), [Right Networks](#), or [Network Management Group, Inc.](#) If you already use one of these companies and they ARE the problem, please email or phone me directly.
6. **For learning/CPE needs**, try [The Technology Lab](#), [The Grove](#), [K2 Enterprises](#) or [CPEToday](#)
7. **CAS and payroll software**, try [AccountantsWorld by IRIS](#)
8. **For accounting software for your clients**, try tools like [Accounting Power](#), [AccountingSuite](#), [Acumatica](#), [NetSuite](#), [QuickBooks Online](#), [Sage Intacct](#), [Spire Systems](#), [Xero](#), or [Zoho](#)

These issues and these solutions may be reasonable short-term AND long-term

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Take one final look at the list that you have now developed. While it may seem overwhelming, remember to focus on first things first. In previous columns, I have mentioned the value of Zig Ziglar's [Wheel of Life](#) (Health, Career, Love, Spirituality, Family, Money, Fun, and Friends). Don't let your list focus too much on work! While many people speak about work/life balance, you'll find you are much more content if you have a to-do list that includes something important in each of these areas. My partner of thirty years had many catchphrases that he liked to use, like "happy wife, happy life." COVID-19 made me more aware than ever of the importance of health and family. It also made me value fun and friends more than ever before.

It may be time to go back to that list one more time and add an extra column that includes the wheel of life attributes. OR you could create a separate list now with your top goals in each area. Focus on what is important to you, and make sure you take time to block the calendar to focus on your top priorities in each Wheel of Life item. You probably realized long ago that the only person you can really control is you. While you can influence others, only you can control yourself (and I'm sure at times you wonder if you are getting that done well.) I'd encourage you not to be too self-centered or "me first" because I believe you'll get the most satisfaction if you help others. For many practitioners, that's why we are in public practice. We wanted to help others with our accounting skills.

With this and every column, I intend to help you stop and think about what is best for you, your firm, and your life. So, what choices can you make today to make for a better tomorrow?

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Randy Johnston has been an entrepreneur, technologist, and teacher for most of his career. He has helped start and run many businesses, and founded Network

Management Group, Inc. and owns half of K2 Enterprises. Randy is not afraid to

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