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Automate Your Workflow

By carefully selecting the right tools and technologies, you can effectively automate different processes and improve efficiency and accuracy in your business.

Amy Vetter • Jan. 09, 2023



The adage “work smarter, not harder” is especially true for accountants. You know your clients are counting on you to provide a level of service that doesn’t just meet their needs—it exceeds them. But in today’s busy world, finding the time and resources necessary to provide that kind of service can be difficult.

That’s why it’s crucial for accountants to take advantage of anything that makes life easier for them and their clients. This includes automating business processes and

streamlining workflows so everyone can get more done in less time.

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Automating Workflows

If you've ever worked in a large organization, you'll know there are hundreds of processes that need to be managed daily. Some of these processes may be highly complex and require complex procedures, while others might be pretty simple and straightforward. Fortunately, technology has enabled us to automate many of the tasks we used to do manually.

Regardless of their complexity level, all these processes have one thing in common: they're time-consuming and inefficient when performed manually. The more automated a business process, the easier it is to handle and manage.

Automating workflows is a great way to streamline your business process, reduce errors, and improve efficiency. By automating repetitive tasks such as invoicing, scheduling, data entry, and more, you can free up time for yourself and your team to focus on what matters most: serving clients!

Identifying What Can Be Automated

Automation can take many forms, from simple systems that save you time by doing repetitive tasks for you to more complex programs that integrate with other software and systems to automate processes.

You can use it to make work easier and more efficient by creating templates or guides that allow you to complete tasks quickly and accurately while minimizing errors. This could include using Excel templates that guide users through creating budgets or forecasting models, setting up easy-to-follow checklists for common client requests, or making simple decision trees.

To get started with automation, first identify which of your workflows are

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Implement automation effectively.

1. Identify your most critical and repetitive tasks.
2. Identify opportunities for automation.
3. Ensure that your software can support automation.
4. Test the software before implementing it in production mode.
5. Plan for regular maintenance of your new workflow processes to ensure they continue working smoothly over time

Empowering Your Team

You can't forget about your team when it comes to efficient business processes. You need to empower your team to create and maintain them. If they do, they'll be more likely to take ownership and add value to the company's business model.

The key to empowering your team is understanding how they work best. Some people like to take charge of their workflow; others are more comfortable with a more structured approach. Some employees want the freedom to experiment with new processes; others want things spelled out clearly in black and white.

Regardless of your employees' preferences, it's important that they feel like they have a voice in defining their workflows. They need to know that management is listening when they share ideas for improving efficiency or reducing waste.

To start engaging your team, try the following:

- Setting up a forum where employees can [share ideas](#) about streamlining processes or automating specific tasks
- Holding regular meetings with managers so that they can discuss ways of making their jobs easier (for example, by eliminating redundant tasks)

- Encouraging participation by offering training opportunities that help employees

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other demands on their time. It's easy for them to feel overwhelmed, which can affect their ability to be present for those around them. By improving automation, efficiency and streamlining work processes, you can gain space and perspective to lead with intention.

Mindfulness helps us stay focused on what we are doing to be more productive and accomplish more tasks in less time. However, most people don't take the time to practice mindfulness because they don't know how or don't think it will benefit them much.

Incorporating mindfulness practices into your daily routine can help you stay focused on what matters most, reduce stress and anxiety, manage emotions more effectively, and make better decisions.

No, you don't have to spend thousands of dollars on the latest robotic accounting software—but that doesn't mean that you can't find ways to streamline business processes and get more done in less time. Taking these steps will help your practice run more smoothly and efficiently. In an age where cloud-based technology improves almost daily, there are almost certainly many other ways to optimize your business processes—and the key is to keep your eyes open for opportunities to simplify and streamline.

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Amy Vetter is a motivational keynote speaker and author. She offers a unique perspective as a CPA and yogi who specializes in technology innovation to inspire business professionals to transform their work and lives. Vetter is the CEO of the B3 Method Institute. www.amyvetter.com.

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