Happiness and Productivity

The challenge facing professionals today is that practitioners from all firm sizes are having to spend too much of their time doing low-value administrative work, instead of ...

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By Chris Farrell, CPA.

When asked why they went into the profession, most accounting professionals will answer, "Because I want to help my clients succeed." It's true that the accounting profession provides great career paths, with lots of interesting things to work on, but the biggest thing that motivates accounting professionals is their big hearts.

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So why all the admin? And why is it just "accepted" in firms?

Like most complex challenges, the root cause cannot be determined until the question WHY is asked 5 times. Let's see how this plays out in an accounting or tax firm using "chasing clients for documents" as the primary challenge we are seeking the root cause to.

> **Question 1 – *WHY are we having to spend so much time chasing clients for documents?***
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> Answer 1 – Because clients are late sending them.
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> **Question 2 – *WHY are clients late sending the documents?***
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> Answer 2 – Because they do not respond quickly to our emails asking for them.
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> **Question 3 – *WHY do our clients not respond quickly to our emails?***
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> Answer 3 – Because it's not easy for them to reply.
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> **Question 4 – *WHY is it not easy for them to reply?***
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> Answer 4 – Because they are usually at work when they get our emails.
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> **Question 5 – *WHY can't they reply when they get our emails at work?***
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> Answer 5 – Because when they receive the email, they are serving their own clients, often they are on the go, and all they have in their hand is their phone. They don't have access to the documents they

> need, they don't have a scanner, and therefore they cannot respond

method that requires them to be at their computer or in their office will immediately create a delay in response time.

Walking in the clients' shoes can be a very helpful exercise.

Here is what happens when the client receives an email from the firm, requesting documents. They open it on their phone and immediately know that they cannot reply. The documents they need are not at hand and most don't have a scanner (in the case of paper documents that need to be sent). So, they read the email, close it and mark it unread, and make a "mental note" to do it when they are back in the office. In the meantime, more emails flood in and the firm's document request email drops down and down until it's out of sight, out of mind.

The staff person responsible for the engagement is then forced to "badger" the client until the client finally finds time to send the documents. At that point texted photos of the documents may be the best they can do, and the practitioner is happy to get them even though it now means a lot of extra steps to get them into a usable PDF.

A focus, therefore, on the digital experience offered to clients can make all the difference in creating happier, more productive staff. Moving off email as the primary method and onto a mobile "all in one" app that allows clients to quickly see what the firm needs, and respond in the moment, is a huge win for staff and for clients. Liscio is an excellent choice to solve these challenges.

Once this is in place, speed and collaboration soars. Client documents, e-signatures, answers to questions, tasks, etc all combine into a single source of truth for staff. With everything coming into one secure place, searching time is significantly reduced and staff can spend their time doing the actual joyful accounting, tax and advisory work for clients, instead of chasing them for items or information needed.

Giving clients an outstanding digital experience when working with the firm can be

their pocket!"

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Chris Farrell, CPA is cofounder of Liscio, Inc. and serves as its Chief Executive Officer. Chris has more than 25 years of experience in the accounting, finance and software industries. Prior to Liscio, he co-founded and led SpringAhead and Tallie where he served as Chief Executive Officer. He also served as the Chief Financial Officer of Occam Networks, the Corporate Controller of C-Cube Microsystems and as an auditor for Arthur Andersen. He holds a Masters degree in Business Administration from UCLA's Anderson School of Management and received his CPA license in California.

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