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FIRM MANAGEMENT

Your Firm and Your Technology Stack

Think carefully about the areas where you can improve your operations. What is taking most of your team's time? Where can we make evolutionary and revolutionary changes?

Randy Johnston • Mar. 14, 2023



You know your client base, service offerings, and strategy. Can we make technology work better for you and your team? I think so in this year of discussing and rebuilding technology stacks. My colleague Brian Tankersley and I continue

creatively thinking for you during tax season while preparing [The Technology Lab podcasts](#) and new CPE materials.

Think carefully about the areas where you can improve your operations. What is taking most of your team's time? Where can we make evolutionary and revolutionary changes? Of course, choosing to do the right thing is always best. Are you consciously selecting the best items for your firm and clients? Or are you being reactive to client requests? Alternatively, do you ask your team to slug away at repetitive and boring tasks? And are you putting yourself through the same thing? We want you to treat yourself and your team in the best way possible.

I recently read the book *Designing Genius*, and Amilya Antonetti concludes that “living a life by design is the key to unlocking what we want from life.” She recommends creating the perfect game for your life, selecting your rules, and working on the theme of your game. The construct includes a One Word theme, Five Areas of Focus, Primary Ingredients, and Should & Should Nots. In effect, she recommends doing what makes you happy every day and inviting people along who will support that happiness or joy. This morning, I've seen the same recommendation from a completely different source.

What Tasks And Technologies Give You Joy?

An A.T. Kearney [survey by Siegel + Gale](#) in 2018 found that while 90% of employees expected to feel joy, only 37% reported feeling it, leaving 53% of employees with a “joy gap.” Organizational joy refers to feelings of happiness that are either about aspects of one's job (e.g., tasks or corporate purpose) or experienced in organizational settings (e.g., at the office). The happiness felt about these topics or in these circumstances has beneficial effects on several organizational outcomes. For example, one experiment found that employees who feel happy while performing their tasks are 13% more productive.

According to Marie Kondo and others, the [decluttering](#) movement sparked joy. Why all this discussion about joy? Because I want you to answer the question: what technologies bring you joy? Take a moment and write those down. Is your list very long or very short? Do the same thing again for technologies that bring disgust, unhappiness, or frustration. We must fix those things. I didn't share my list in this column because I didn't want to bias your thinking. As a personal favor, if you don't mind sharing one or both lists with me, send them to me by email at randy@k2e.com.

We commit to working on these issues in columns throughout the year. I will warn you that we are not magicians but have experience in many technologies and get to routinely fulfill [my personal mission](#) “To help as many people as possible to use technology in a way that benefits them most.” We want to leverage the items in your technology stack that bring you joy and help you solve the issues in your technology stack that don’t work well.

What Technology Is Good For You AND Your Firm?

As noted above, your list is all that matters here. However, as the year progresses, you’ll see our new recommendations in various technology stacks. Throughout the years, I have focused on technologies that provide leverage, ease of use, or client experience. For example, many of you are looking for a better way to interact with clients. We have recommended tools like [Liscio](#), [Suralink](#), [SmartVault](#), or [e-Courier](#).

While these solutions are good, how do they fit into your overall strategy? For example, if you are fully committed to the [CCH Axxess](#) technology stack, your firm and clients may be best served by using the [CCH Axxess Client Collaboration](#) portal. If you are fully committed to the [Onvio](#) technology stack, your firm and clients may be best served using the Onvio Document Center portal. If you are running a CAS practice, do tools like [AccountantsWorld Power Practice by IRIS](#), [Dext](#), solutions from [CPA.com](#), or outsourcing to [BooxKeeping](#) make sense? Or perhaps you need to rebuild your practice operations leveraging solutions such as [TPS Cloud Axis](#), [Clarity Practice Management](#), [Corvee](#), or [Ledgible by Verady](#). As a buyer of these technologies, how do you know you are buying the best option or being sold a bill of goods?

One technology stack consideration is the cost of the licensing requirements of your primary publisher and the supplemental tools. Plus, another licensing expense is adding the productivity tools for word processing, email, and spreadsheets that you must have to run the firm, such as [Microsoft 365](#), [Google Workspace](#), or [Zoho One](#). Additionally, you have additional costs with [Adobe Acrobat Pro](#) and [TicTie Calculate](#) for electronic markup if you are not using a solution like [Doc.It Suite by IRIS](#).

A third consideration is the required supporting hardware. Next, a fourth consideration is the cost of the infrastructure. A fifth consideration is the training costs. A sixth item is the ongoing support required for your team, which may be with internal personnel or outsourced to a managed service provider, like [NMGI](#), or a hosting company, like [Cetrom](#). A seventh item could be the items needed to work from home, remotely, or simply for convenience, like a smartphone and watch. All these items should be summarized in a budget, even though our [Accounting Firm](#)

[Operations Technology survey](#) shows that a large percentage of CPA firms don't manage technology from a budget. We are happy to provide budget templates to you. As the year progresses, your vision of what is needed for your firm, and what it should cost will morph and hopefully become finely honed.

So, What's Next?

Throughout this year, we'll cover products, suites, and technologies to supplement your firm's technology stack. Our plan is to have modernized, convenient stacks, and not the same old approaches which are getting long in the tooth. We hope we can reduce some of the tools in use today that are no longer needed and add technology to make your team's interaction with your clients easier while making your firm more profitable. And isn't that what is best for all involved?

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