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bottom lines and grow your firm.

**Jim Boomer** • Apr. 19, 2023



As a leader in your firm, you likely have ambitious goals to impact your clients' bottom lines and grow your firm. But to reach those objectives, you need a team, and that's becoming increasingly difficult to find if you're hiring accountants.

According to Caseware's [2023 State of Accounting Firms Trend Report](#), more than 90% of accountants and 95% of auditors find hiring skilled talent challenging.

Fortunately, it is possible to grow your team and meet your goals. You just need to

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Facing accountant handle engagements from end to end. Everything was handled by a CPA, from collecting client documents to doing the work and delivering the tax return, financial statements or other work products.

Today, successful firms realize that every step in that process doesn't have to be handled by a CPA (or even by a human).

Break down your processes into individual tasks and consider how to take a team approach to get the work done, leveraging technology and pulling in other team members. When you identify a task that doesn't necessarily have to be done by a CPA, you have three options:

You can:

- Automate that step in the process
- Outsource it to an independent contractor or service provider
- Hire a non-CPA with the unique skills to handle that part of the engagement

For example, consider a new client that calls your firm looking for help with their business tax return.

1. Your marketing department can conduct the initial pre-screening conversations to ensure they're the right fit for the firm
2. Operations can onboard the client and get them connected to your portal or whatever technology you use to collect client documents
3. You can outsource the preparation of the return to a service provider or independent contractor
4. A CPA in your firm reviews and meets with the client to discuss advisory opportunities, tax planning for next year, etc.
5. A combination of automation and effort from your operations team get the return signed and e-filed

When four out of five steps are handled by someone other than a CPA, the

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their car going between the office, client engagements, meetings and networking events.

To improve productivity, the firm hired a driver. The partner could spend otherwise unproductive time in the car working—catching up on emails, making calls, etc.

While hiring a driver might not be the right solution in every firm, it's just one example of a creative solution to a problem that a firm uncovered when they took a close look at how the people in their firm were spending their time.

You might be able to take some of the load off of your busy partners and managers by hiring non-accountants to help with business development, project management, content creation and more.

## **Put people in positions that honor their unique abilities**

You'll serve your clients better when everyone in your firm is working within their unique abilities.

Some accountants are detail-oriented, and some prefer to look at the big picture. Some enjoy interacting with clients and co-workers all day, and some are most productive when they work in relative solitude. So if you expect every accounting professional in your firm to work the same way, people who don't fit the mold will struggle.

Instead of expecting everyone in your firm to have the same skills, create a process that encourages self-reflection and helps employees identify their areas of strength and passion. This can involve career mapping, skills assessments, 360-degree feedback from peers, etc.

Once you understand your team's unique abilities and skillset, you can build roles

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because of her experience working as a staff accountant.

If you have people in your firm that aren't quite the right fit for their role, where else can you deploy their talent?

With the right mindset and a willingness to try new approaches, you can think of talent challenges as unique opportunities to reinvent your firm in ways that ultimately elevate it to new heights. The key is to have courage and embrace outsourcing, delegation, automation, non-traditional hiring and getting people in positions that honor their unique abilities. The result will be a workplace that better meets the needs of everyone involved—one that's attractive to job seekers and beneficial for current team members, too. It may require some trial and error, but eventually, you will create new levels of productivity and success for you, your team, and your clients.

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