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VOLUME 30
NUMBER 3

Today's Technology for Tomorrow's Firm



WORKFORCE MANAGEMENT DURING A PANDEMIC

PRODUCT REVIEWS:
Non-Profit Accounting

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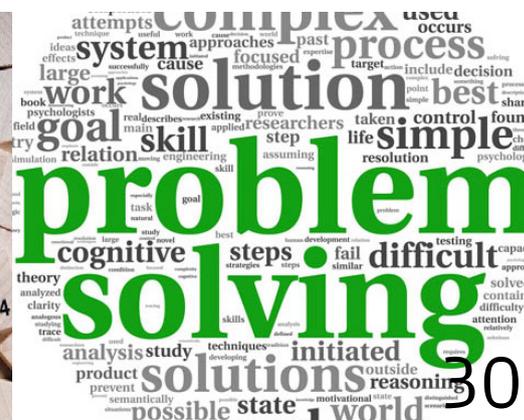


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This is Now

IN MY NEIGHBORHOOD, the streets are wide and curvy, they circle around and meet each other at multiple intersections, interspersed with cul-de-sacs. Every house has a driveway, and the yards are large and, now that spring is upon us, green. Daffodils and crocuses are blooming, buds are starting to appear on trees and bushes, and even dandelions are all over the lawns.

The warmer temperatures and sunny days make it easy to get out of the house and take a walk. The statewide lockdown and school closure mean the houses are full, families are together, adults are working from home when their jobs allow it, students are learning at home, teachers are teaching from home, and no pet is left alone.

And as we all share a common fear of this unknown illness charging across our nation, there are moments to cherish because

we are doing this together. All day long there is a constant parade of neighbors, walking the sidewalks of my neighborhood, waving friendly greetings from a safe distance, breathing deeply of the fresh spring air, offering to share excess supplies, wishing each other well.

Meanwhile, there is a longing for normalcy. On the tax accountant side of my life, I'm diligently processing returns, focusing on those clients who will get refunds, grateful for the extended filing

date which takes the pressure off of working long nights. Would I return to my normal tax season chaos if I could? In a heartbeat.

There remain the larger, unanswered, philosophical questions, the questions that will haunt us for the rest of time. Did we do this to ourselves? Can we truly recover from this? Will the next one be more devastating? Is this what the end looks like? What have we



learned? What will we never learn?

Perhaps our lessons to learn relate to the fragility of life, of every molecule around us, the danger in things we cannot see, the precious moments with those we love, and a new, deeper understanding of what is important, what is essential, in our lives. Will we help our clients restructure their processes and reassess their mission to develop a more meaningful purpose? Will we see the world more clearly through the eyes of others? Do we dare hope for a silver lining to this pandemic?

For now, we wait, and we walk, and we notice that Mother Nature continues to nurture us, to show us the sunshine and the flowers when everything else seems bleak. ■

— Gail Perry, Editor-in-Chief



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DO YOU HAVE A CLEAR EDUCATION VISION?

"IF YOU DON'T know where you are going, any path will get you there," said Lewis Carroll. This adage has historical truth and perspective. You may be looking at your plan for the rest of the year and you may have plenty of regular work already in front of you. As part of your firm planning, whether in the past year or coming up soon, you should have set both strategic and tactical goals. Most firms have an education component in their plan.

No, I'm not talking about 40 hours of CPE to maintain your license, even though that is important. The real question is about the life-long or the continuous learning you and everyone in your firm should be consuming. For several decades, I have been a proponent that 40 hours of CPE education are the minimum to maintain competency. Other consultants to the profession are now following that recommendation, too.

To be innovative, far more learning needs to be occurring, and the topics selected should be beyond your normal area of focus. Learning plans may be individual, dictated by the firm, or merely an area of interest outside of your work obligations. You will find many rewards in growing your knowledge. While it is challenging to be an expert in more than one area, the more you know about options available to clients, the better chance you have of recommending the best solution. With the increasing arrival speed of technology-based solutions, it is difficult to know what is available, let alone how each option works. With a holistic view of clients' needs, the better you can serve them. On the other hand, "just in time" training may help you get today's task done, but does not help you prepare for tomorrow.

PROACTIVE EDUCATION OR REACTIVE TRAINING?

Are you thinking about improving your effectiveness or efficiency? Education helps you with the big picture, and training enables you

to do something better. Both proactive education and reactive training serve a purpose. You should select the right way of improving yourself and your business. For a variety of reasons, this education vs. training question has come up every week so far this year. With today's rapidly changing technology, people are frequently choosing training over education, going for efficiency over effectiveness. It's not that you don't need both, you do. Unfortunately, with all the conflicting priorities, relegating the importance of education to the back burner and reacting to today's urgent problem with training is chosen far too often. Short training videos, using Google to search for an answer, attempting to use LinkedIn Education (formerly Lynda), and learning in short nano CPE are trends that do not serve education or knowledge well.

What's the saying? Doing the right thing is more important than doing things right. "Doing things right" means doing things in the manner they are expected, needed, or required to be done. It, then, relates to the 'how' aspect of an action. For example: to ensure proper compliance, an accountant must file a tax return correctly. "Doing the right thing" means making the right choice, choosing the right path, and displaying high ethics and moral integrity. It, therefore, relates to the 'what' aspect of the action. For

example: by rejecting a client's desire to pay fewer taxes by filing a false but proper tax return, an accountant does the right thing and earns our respect. For accountants, respect comes from independence, knowledge, effectiveness, and efficiency. Consider this point: *both education and training should be an investment, not an expense.* A side effect of wisely investing in education and training is that your team members improve their knowledge, effectiveness, and efficiency. Further, properly implementing the latest educational techniques and technology into crucial operations of your business can set your business apart from the competition. Therefore, the investment you make in education, training, and technology should yield returns many times over the price paid.

DECIDE THE RIGHT THING TO DO

This decision drives effectiveness. In business, there are reasons for both strategic and tactical plans. What is the right thing to do for you and your business? As noted above, do you have a time that you stop to consider the big picture with an annual planning meeting? Do you review your plan regularly, so you continue to focus on the right thing? Do you have an education and learning plan? If not, consider creating a learning matrix ([https://www.analyticsinhr.com/blog/create-skills-matrix-](https://www.analyticsinhr.com/blog/create-skills-matrix-competency-matrix/)

competency-matrix/) or a learning ladder (<https://www.construx.com/professional-development-ladder/>). In all cases, proactively plan your CPE and education with the right thing in mind.

Note that this article is not suggesting what is the right or wrong thing for you to do. The guidance is that you should simply take the time to plan and choose for yourself. By the way, this does help me fulfill my mission: "To help as many people as possible to use technology in a way that benefits them most." (www.randyjohnston.com). All of the CPE courses I write every year fulfill this personal mission. Our entire K2 team (www.k2e.com/instructors) operates the same way.

At this year's Top Thought Leader event, I was surprised that many consultants to the profession didn't understand the difference between education and training as well as independence and advisory services. Many in the session didn't know the difference between education and training and frankly thought they were the same. I was shocked. While some thought leaders valued independence, others thought there was no conflict of interest at all from taking unstated profits from partners.

Continued online at
www.CPAPracticeAdvisor.com/21129064

WORKFORCE MANAGEMENT

DURING A PANDEMIC

By Paul McDonald



THESE ARE UNPRECEDENTED times, as leaders try to manage staff amid the COVID-19 pandemic. While some companies have had to furlough staff or make cutbacks, others have been able to maintain operations by asking their employees to work remotely to adhere to social distancing guidelines. There also are industries where organizations need to hire to address increased business activity or keep key initiatives on track.

Following are tips to help you manage your staff in this new environment.

MANAGING A REMOTE STAFF

Transitioning to a full-time virtual workforce can be a challenge. Managing a remote team requires a unique balance of empathy and guidance. Here are ideas to keep in mind.

- **Recognize technology is a boon but not a panacea.** We are fortunate that technology can facilitate remote work; otherwise, telecommuting wouldn't be an option. The first order of business for most companies now is how to deal with an entire workforce that is suddenly required to work remotely, including many employees unaccustomed to telecommuting. No matter which tools they use, everyone on your team needs to be on the same page about how these systems work, why they're being used and who can fix them if troubles are encountered.
- **Be an authentic leader.** It's up to the leaders of every business to serve as the glue that holds their team together during these stressful times. It's more essential now than ever as so much of the workforce is dispersed. Your team needs a guiding light and looks to you for counsel and calm.
- **Communicate effectively and often.** Set up regular calls with your employees to offer company information and share project updates. Consider conducting conference calls that feature video as well as audio. It can be therapeutic for team members to see each other, even though they are physically far apart.
- **Appoint clear project managers.** Prioritizing and reprioritizing projects will help your team move smoothly and confidently through the foreseeable future. With everyone in the department working remotely, communicate

who the project managers are for each task and initiative. A lack of collaboration can cause people to feel lost, disconnected and isolated and lead subgroups to run off in their own directions.

- **Apply the human touch liberally.** A leader's role in holding the group together also extends to people's personal, human needs. We are all challenged during this time to ward off the low spirits isolation can bring. The opportunity to interact, even virtually, with other people every day can bring a sense of normalcy to a very stressful time. Quick check-in calls about non-work matters on a regular basis are something staff may look forward to. How are people handling the situation? How successful are they at keeping distractions and interruptions that are such a part of home life to a minimum? How are they grocery shopping? Movie recommendations? Connect on work, definitely, but also prioritize connecting on personal needs and experiences.
- **Offer flexibility generously.** This is not a time for clock-punching and cookie-cutter rules. Recognize that everyone's situation is different. Some employees may live alone. Some may be having to keep kids entertained now that they are out of school all day. Some might be caring for someone who is ill. Let them know you understand their need for flexibility.

HIRING REMOTELY

For those companies who are looking to staff accounting and finance roles amid this crisis, here are virtual interviewing and onboarding tips.

- **Tap multiple resources for help in your search.** When you need to hire, job boards are a start but often are not targeted enough to bring in the best fit. Contact former employees who were great performers — those you know are

It's a new world we have to adapt to for the time being.

capable of successfully working off-site. Those employed elsewhere might entertain a generous offer. Also ask your employees if they know anyone who would be a good addition to the team. If you enlist the help of a staffing firm specializing in placing accounting and finance workers, their professionals will have a database of candidates who have been pre-vetted.

- **Know how to conduct a remote interview.** Not only will new employees have to work from home initially, but you'll also have to interview them virtually. First, make sure you know how to work your teleconferencing app. Ideally, it should be video- as well as audio-capable, which will allow you to better build rapport with interviewees and more accurately assess candidates' nontechnical skills and potential fit with your company culture.
- **Evaluate aptitude for remote work.** In addition to discussing the accounting or finance position itself with the applicant and assessing their experience during the interview, include questions about skills that are common to successful virtual workers. They should be reasonably tech savvy, used to taking the initiative on projects, good problem solvers and expert communicators.
- **Onboard virtually.** Invite new hires to a video conference with your current employees and ask each team member to briefly describe their role in the group. Working remotely can be isolating, especially for people just joining the team, so consider pairing each new hire with a staff member who can help them

through their first weeks on the job. The arrangement should be more mentorship-like than a substitute for formal on-the-job training. Also let new employees know you are available to address any questions or concerns they may have.

- **Consider temporary professionals.** For skills that are not needed year-round or for short-term projects and activity spikes, interim professionals who can work remotely can provide a valuable supplement to your department. They can keep projects moving and provide stopgap relief and a morale boost to a team that has been thinned by colleagues out ill or unable to work from home.

ADDRESSING YOUR NEEDS

Recognize and accept that, as a manager, you are dealing with much of the same uncertainties and stressors as your employees. While you need to dedicate time and resources to support your staff, you must do the same for yourself. Take breaks from work. Spend time focusing on your family and friends. Do activities that help you de-stress. Enhancing your wellbeing will also make you a better manager for your team.

It's a new world we have to adapt to for the time being. Recruitment will look different for businesses hiring people into positions that are remote from Day One. These suggestions can help you provide support for your staff and add talent to ensure your accounting and finance team can help the business through these uncertain times. ■

Paul McDonald is senior executive director at Robert Half, the world's first and largest specialized staffing firm. He writes and speaks frequently on hiring, workplace and career-management topics. Over the course of 35 years in the recruiting field, McDonald has advised thousands of company leaders and job seekers on how to hire and get hired.

Features and Functionality are Essential

YES, IT'S TRUE that for-profit and nonprofit businesses can use the same accounting software, particularly in the nonprofit's infancy stages. But as an organization grows, it may find itself searching for features and functions simply not found in standard accounting software applications. While all businesses, whether for-profit or nonprofit, need to manage deposits, track expenses, and pay bills, nonprofits are also tasked with managing grants and keeping a handle on volunteer staff.

Membership organizations need to be able to track memberships accurately, while nonprofits running several programs simultaneously need to create and manage a separate fund for each active program in order to determine financial success. Nonprofits also need to be able to manage grants and sponsorships, and most importantly, nonprofits need a way to handle recordkeeping and accounting for their donors, from initial contact to managing and retaining donors. In fact, the lack of donor management is the number one reason that nonprofits turn away from traditional accounting software.

It can be a challenge to find the software best suited for the nonprofit

in question. That's where features and functionality really come into play. For instance, a nonprofit that is supported mainly through grants will need a very different software application than the nonprofit supported solely by donations. You and your client will also want to take a look at deployment options, and consider which works best for the particular situation.

If you're ready to get started on finding nonprofit software for your client, be sure to check out the applications reviewed in this issue. They include:

- Abila MIP Advance
- AccuFund
- Aplos Fund Accounting
- Araize Fast Fund

- Blackbaud Financial Edge NXT
- Cougar Mountain Denali FUND
- Fund E-Z
- GMS Accounting
- Serenic Navigator for NPO

The products included in this review of nonprofit accounting applications vary widely in features, functionality, and pricing, with some of the products better geared towards smaller nonprofits, while others offer nearly every feature a nonprofit may need, both now and in the future. We also took a look at two popular small business accounting software applications, QuickBooks Online and Xero, in terms of their nonprofit accounting features. A noteworthy app worth exploring is Tangicloud Fundamentals.

- QuickBooks Online
- Xero
- Tangicloud Fundamentals

Included with the reviews is a handy chart that identifies the features found in each application, making it easy to pinpoint which of these applications may be best suited for your client. Features and functions that we looked at include the following:

- Chart of accounts structure
- Online or on-premise deployment
- Grant management capability
- Donor management capability

- Availability of a mobile app
- Fundraising capability
- Membership management

We also let you know if a demo is available to try out prior to purchasing. Finally, we address the biggest issue of all, pricing. After all, it doesn't matter what features an application offers if it isn't in your client's budget. While not all vendors share pricing with us, when they do, that pricing will always be included in the review.

There's no better time than today to start looking for the nonprofit accounting software that best suits your client, and there's no better place to start than with the reviews included in this issue. ■

Mary Girsch-Bock is a freelance writer specializing in business and technology issues and is the author of her first book, several HR handbooks, training manuals, and other in-house publications. She can be reached at mary.girschbock@cpapracticeadvisor.com



	Cloud Accessibility	Customizable Chart of Accounts	Multiple Account Segments	Multiple Transaction Types	Budgeting	Donation Tracking	Donor Management/ Fundraising	Grant Management	Allocations	Automated Due to-Due From Capability	Multi-Level Security	Management Reporting	Integration with Vendor Modules	Integration with Third-Party Applications	Help & Support Options	2020 OVERALL RATING
ABILA MIP	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	★ 5
ACCUFUND	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	★ 5
APLOS	X	X	X	X	X	X	X		X		X	X	X	X	X	★ 4.75
ARAIZE FAST FUND	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	★ 4.75
COUGAR MOUNTAIN DENALI	X	X	X	X	X	*X	*X		X	X	X	X	X	X	X	★ 4.75
FINANCIAL EDGE NXT	X	X	X	X	X	*X	*X	X	X	X	X	X	X	X	X	★ 5
FUND E-Z	X	X	X	X	X	*X	*X		X	X	X	X	X	X	X	★ 4.75
GMS ACCOUNTING	X			X	X			X	X		X	X	X	X	X	★ 4.5
SERENIC NAVIGATOR	X	X	X	X	X	X	X	*X	X	X	X	X	X	X	X	★ 5

*SEPARATE PROGRAM

NONPROFIT ACCOUNTING SYSTEMS: REVIEW

Abila MIP Cloud

STRENGTHS:

- Offers 25 different modules
- Product implementation handled by Abila
- Excellent budgeting capability
- Forecasting feature
- Ideas Portal

POTENTIAL LIMITATIONS:

- No grant management module
- Segment length cannot be changed once implemented

MIP Cloud from Abila/Community Brands, offers convenient online access with true fund accounting capability. Like MIP Fund Accounting, MIP Cloud is best suited for small to mid-sized nonprofit organizations and government entities, offering 25 different modules to choose from, with core modules

including G/L, A/P, A/R Reporting, Bank Reconciliation, Budget, Data Import/Export, and Forms Designer.

MIP Cloud's latest addition offers numerous upgrades and enhancements including extensive improvements to the user interface, the addition of drill-down configurable user dashboards, and various reporting enhancements.

Pricing for MIP Cloud varies, with pricing dependent on the number of modules purchased along with the

www.abila.com

2020 OVERALL RATING

5

Read the full review for this product online at:

www.CPAPracticeAdvisor.com/21132064

number of system users. Pricing details are available from Abila upon request. All product implementation is typically handled by Abila personnel or authorized resellers, with implementation charges separate from product pricing.

AccuFund Accounting Suite

STRENGTHS:

- Modular structure
- Cloud or on-premise deployment offered
- Includes a complete Payroll Suite
- Automation Workbench feature

POTENTIAL LIMITATIONS:

- Not suitable for smaller organizations
- Product support must be purchased separately

AccuFund Accounting Suite is a modular accounting suite well suited for mid-sized nonprofit organizations and government agencies. Available as an on-premise application as well as on the cloud, AccuFund Accounting Suite allows nonprofits to purchase the modules they need and add others if necessary.

AccuFund Accounting Suite

includes a customizable G/L structure that supports up to 255 alpha-numeric characters, with up to 99 segments or elements available. Users can determine the structure they wish to use during the application setup process or opt to use the default chart of accounts that is included in the application.

Available as an on-premise application, or on the cloud, users can purchase the modules they need, and add others at a later time. Product purchasing and implementation is typically handled by authorized resellers, including product installation, data conversion, and

www.accufund.com

2020 OVERALL RATING

5

Read the full review for this product online at:

www.CPAPracticeAdvisor.com/21132065

employee training. Pricing for AccuFund depends on the modules purchased, the number of system users, and the deployment method chosen, with complete pricing available directly from AccuFund or area resellers.

FIRST HAND
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How AccuFund Helped a Local Government Keep Serving Citizens

The ongoing pandemic has greatly affected not only individuals and businesses, but also governments at all levels. For many Americans, their local city government is a bedrock, and their continued interactions and relationship with it can help maintain at least a small sense of normalcy or security even in unsettling times.

Following their state's direction, the city of Picayune, Mississippi declared a local emergency on March 16, 2020, instructing non-essential businesses and workers to work from home when possible. Picayune is a distant suburb of New Orleans. Although the city's administrative staff are considered essential government workers, city clerk Amber Hinton determined that most could work from home. Her office oversees operations of several departments, including financial, payroll, payables, utility billing and IT.

The city has been using the government accounting and management suite from AccuFund (www.AccuFund.com) for more than ten years, but in 2019 switched to the completely cloud-based version of the system. The program includes modules for managing utility billing, property taxes, fees and licenses, permits, inspections,

court fines, and grants, along with traditional accounting features such as AR with inventory, purchase orders, work orders, human resources, payroll, fixed assets and travel management. Hinton said the employee self-service functions for HR, payroll and other requests has made those responsibilities much easier.

Hinton who has been with the city's staff for 14 years and has been city clerk for ten, moved to the cloud platform to enable greater mobility and access to financial management and reporting by the city's staff, including by employees who occasionally needed to work from home. She also noted that there was significant IT cost-savings in not having to maintain a server at the city's office.

When the Covid-19 crisis happened, Hinton was able to quickly have most of her staff retrieve their laptops and VOIP headsets from the office, take them home, and resume work, with almost no disruption to customer service. AccuFund also allows them to easily accept online payments from city residents for utilities, including sanitation, water and natural gas service. The city also maintains a drive-up window for residents who wish to continue paying utility bills in person.

"Moving to the cloud version of AccuFund made a huge

difference in how quickly we were able to transition to a remote work model, and in our ability to continue offering city services to our residents even during the state of emergency," Hinton said. "From an employee perspective, using the system at home is no different than using it in the office. They simply log in and have access to the same areas of the program they are authorized to use."

The city clerk reports to the city manager, mayor and council, and Hinton says she is able to easily create, customize and digitally deliver the reports they need to oversee the city's finances. The system also automates many processes.

When the city first implemented AccuFund, they had the assistance of a local reseller, Mountaineer Computer Systems, Inc., who ensured all data was converted. Since the switch to the cloud system last year, Hinton said they no longer need to worry about updates or other IT issues, since that is all handled automatically by AccuFund.

"AccuFund has helped us continue to serve our citizens while we all get through this difficult time, and has helped our city staff remain a cohesive team," Hinton said. "Using the online AccuFund government accounting system made us better prepared to handle this situation."

Read the 2020 review of AccuFund Accounting Suite at www.CPAPracticeAdvisor.com/21132065

REVIEW: NONPROFIT ACCOUNTING SYSTEMS

Aplos Nonprofit Software

www.aplossoftware.com

STRENGTHS:

- Offers complete fund accounting capability
- Donor management and fundraising tools included
- Affordable pricing for all nonprofits
- Custom Report Builder

POTENTIAL LIMITATIONS:

- No grant management module
- Account segments only in Advanced Accounting
- No Due To/Due From capability

Aplos Nonprofit Software offers complete fund accounting capability and is well-suited for small to mid-sized nonprofit organizations. As an added convenience, Aplos works on both Windows and Mac platforms. Aplos also offers Aplos Advanced Accounting, which integrates with the nonprofit application to provide more comprehensive

fund accounting capabilities.

The latest version of Aplos offers numerous system additions and enhancements including the ability to attach files to A/R, A/P, journal entries, and bank reconciliations.

Aplos Suite subscription pricing starts at \$59 per month for the complete suite of features, and supports up to 2 system users and up to 500 contacts, with an option to purchase additional contacts in blocks of 1,000 for \$10 per month per block. Additional user licenses can also be purchased for \$10 per month. An

2020 OVERALL RATING

4.75

Read the full review for this product online at:
www.CPAPracticeAdvisor.com/21132068

Advanced Accounting bundle is also available for \$250 per month and includes Advanced Budgeting, Recurring Transactions, and Tag Dimensions, which can be useful for organizations that manage multiple grant, funds, or programs. Aplos also offers a free 15-day trial for new users.

FastFund Nonprofit Accounting

www.araize.com

STRENGTHS:

- Two plans available
- Product support included in the price
- Good budgeting capability

POTENTIAL LIMITATIONS:

- Does not include a separate grant management module
- Not suitable for very large nonprofit organizations

FastFund Nonprofit Accounting from Araize is best suited for small nonprofit organizations and government entities. Offered as an online application, FastFund offers flexible purchasing options, with two editions available, Standard and Premium, and users are able to add modules to

FastFund is currently rolling out an updated user interface for its online application, with the updated user interface available in Administration, Fundraising, Payroll, and various Accounting features including budgets, vendors, clients, and projects. The roll-out is expected to be completed by mid-2020.

The Standard version of FastFund currently runs \$42 per month for a single user, with AR, AP, and Cost Allocations modules available for an additional \$19 per module per month. The Premium edition is \$94 per month and includes the AR, AP, and Cost Allocations

2020 OVERALL RATING

4.75

Read the full review for this product online at:
www.CPAPracticeAdvisor.com/21132070

modules. The Fundraising module starts at \$42.00 per month and Payroll starts at \$66.00 per month for up to five employees, with payroll for 50 employees running \$176 per month. The monthly subscription includes unlimited customer support by telephone, email, and web as well as weekly training webinars and any software enhancements and upgrades.

the Standard version or scale up to the Premium version when necessary.

Financial Edge NXT

www.blackbaud.com

STRENGTHS:

- Good selection of modules
- Good integration options
- Grant management capability included

POTENTIAL LIMITATIONS:

- Complex product setup and training required
- Not suitable for smaller nonprofits

Financial Edge NXT from Blackbaud is best suited for mid-sized nonprofit organizations and government entities looking for solid fund accounting capability. Accessible via the cloud, as well as from mobile platforms, Financial Edge NXT integrates with a variety of other Blackbaud

Edge NXT includes features such as G/L, A/P, A/R, Cash Management, Purchasing, Fixed Assets, and budgeting, as well as options designed specifically for the nonprofit market including endowment accounting, complete restricted fund management, encumbrance reporting, and project and grant accounting.

Offering multiple add-on options ranging from donor management to a comprehensive fundraising platform, Financial Edge NXT is a good option for nonprofit organizations, associations, and government entities. The application also offers view-only

2020 OVERALL RATING

5

Read the full review for this product online at:
www.CPAPracticeAdvisor.com/21132073

licenses for those that need access to reports and other information but are not responsible for adding or editing data. If interested, sign up to view an online demo or request a more comprehensive demo from Blackbaud. Pricing can also be obtained directly from Blackbaud upon request.

applications, all designed for nonprofit organizations.

As a complete fund accounting solution, Financial

Cougar Mountain Denali Fund Nonprofit Accounting

www.cougarmtn.com

STRENGTHS:

- Modular structure allows users to buy only the necessary modules
- Offers an enhanced interface for easier navigation
- Now offers cloud deployment

POTENTIAL LIMITATIONS:

- Does not offer a grants management module
- Donor management not included in core application

Denali Fund Nonprofit Accounting from Cougar Mountain Software is a good fit for small to mid-sized nonprofit organizations and government entities looking for solid fund accounting capability. Denali Fund is available as an on-premise application as well as on the cloud.

Denali Fund now offers a

cleaner, more streamlined user interface that provides easy access to all installed modules, as well as a navigation bar to the left of the screen that offers drill down access to features. Users can also access reporting, training videos and other frequently used functions from the navigation bar, while the dashboard feature in Denali Fund allows admins to create custom dashboards for each system user.

Denali is available in three packages: Basecamp, Ascent, and Summit, or users can purchase desired

2020 OVERALL RATING

4.75

Read the full review for this product online at:
www.CPAPracticeAdvisor.com/21132072

modules separately. Pricing for all modules and packages is available from Cougar Mountain Software upon request, and a 60-day demo is available for those that wish to try out the application prior to purchasing.

NONPROFIT ACCOUNTING SYSTEMS: REVIEW

FUND E-Z Nonprofit Accounting

www.fundez.com

2020 OVERALL RATING

4.75

Read the full review for this product online at: www.CPAPracticeAdvisor.com/21132076

STRENGTHS:

- Can be installed on-premise or accessed via the cloud
- Available in two versions
- Offers custom chart of accounts creation

POTENTIAL LIMITATIONS:

- Indirect allocations only available in the Pro version
- No grants management module available
- No users are required to purchase a support plan

FUND E-Z from FUND E-Z Development Corp. is best suited for small to mid-sized nonprofit organizations. FUND E-Z offers both on-premise and cloud-hosted deployment options, and includes two versions, Basic and Pro, with growing nonprofits able to scale up to the more powerful plan if needed. The pro edition of

FUND E-Z also includes an optional batch processing module for nonprofits that wish to review transactions prior to posting.

Both the Basic and Pro plans offer a customizable chart of accounts, with the Basic version supporting up to 22 characters for account names, and each financial account name can be up to 6 characters in length while fund level and cost center segments support up to 4 characters.

The Pro version offers more customization options,

with the financial account, fund level, and cost centers all supporting up to 10 characters in length for up to 100 characters.

FUND E-Z pricing is only available directly from the vendor.

GMS Grant Management System

www.gmsactg.com

2020 OVERALL RATING

4.5

Read the full review for this product online at: www.CPAPracticeAdvisor.com/21132078

STRENGTHS:

- Strong fund/grant management
- Good selection of modules
- Long list of add-on supplements

POTENTIAL LIMITATIONS:

- No donor management or fundraising features available
- No cloud version available
- Difficult to customize reports
- Limited third party integration
- Chart of accounts not customizable

GMS Accounting and Financial Management/Reporting System is designed for nonprofits and public organizations that need a specialized accounting application to better manage contracts, funds, and grants.

GMS is designed to be deployed on-premise, although there are specifications avail-

able to have the application hosted on the cloud.

GMS offers a 5-digit general ledger code that is used to track assets, liabilities, revenue, expenses, and equity. For more in-depth tracking, users can utilize 6-digit program elements, which are designed to track program or grant details, including cost centers, activities, and components.

Pricing for GMS is based on the number of system users, with pricing available directly from GMS. In addition, GMS offers a variety of add-on supplements

in a variety of categories including payroll, financial reporting, accounts payable, accounts receivable, and cost allocation, with all supplements priced separately.

Serenic Navigator for NPO

www.serenic.com

2020 OVERALL RATING

5

Read the full review for this product online at: www.CPAPracticeAdvisor.com/21132090

STRENGTHS:

- Complete all-in-one functionality
- Offers complete award/grant management
- Excellent analytical reporting options

POTENTIAL LIMITATIONS:

- Complex system setup
- Pricing can be prohibitive for smaller organizations

Serenic Navigator for NPO is a robust financial management application designed for nonprofit organizations. Serenic also offers versions for NGO's, K-12 educational institutions, and public entities. Powered by Microsoft Dynamics 365 Business Central, Serenic Navigator for NPO is designed to meet the accounting,

management, and administrative needs of nonprofits, all from a single application. Serenic Navigator NPO can currently be deployed as a hosted/SaaS solution or via Microsoft Cloud Services.

Serenic Navigator for NPO is best suited for larger nonprofits that desire an all-in-one application that includes complete accounting, budgeting, and grant management capability. Along with the core application, Serenic Navigator also offers add-on modules such as Deposits & Loans, Field Connect, and Donor

Management with Donor Direct. Those interested in Serenic applications should contact the vendor directly to request additional information.

Tangicloud Fundamentals

www.tangicloud.com

Launched in 2016, Tangicloud has consistently delivered comprehensive fund accounting software designed for nonprofits and government agencies. Today, the original program has been entirely rewritten, offering a series of core modules and apps designed to be delivered via Microsoft Cloud.

The new application, Fundamentals, is powered by Microsoft Dynamics 365 Business Central, and it is flexible enough to suit the needs of nonprofits and government agencies of any size.

Fundamentals core features include G/L, Bank Management, Multi-Currency, Budget Planning & Control, Enhanced Allocations, Commitments/Encumbrances, Purchase Orders, A/P, EFT and MICR Payments, Fixed Assets, Inventory, A/R, Project Management, Workflow with Approvals, Revenue

Recognition, and Indirect Cost Calculations. Apps designed for team users include Timesheets, Expense Reports, and Requisitions. In addition, there are Grant Management, Advanced Allocations, and Procure to Pay apps available, with Labor Allocations and Deposits and Loans due to be released in the fall of 2020.

The changes in Tangicloud and its core product are due to the desire to move to Microsoft's Business Central Cloud. In the process of updated the deployment method, Tangicloud took the opportunity to enhance the core modules to better reflect the needs of the nonprofit community. These enhancements include the addition of eight global dimensions, an increased number of user defined fields, and improved navigation designed to simplify the user experience.

Fundamentals also includes industry-specific account categories, and the A/P module has seen updates such as a Quick Pay option, MICR check processing and the option to allow early A/P payments. Where users may see the most significant changes is in the reporting module, with hyperlinks now included in all reports, enabling users to drill down to G/L entries. Also new are updated report formatting options, as well as the addition of nonprofit specific reports such as Statement of Activities, Statement of Financial Position, and Statement of Functional Expenses.

Tangicloud has also added a new partner program and is actively helping new partners transition to the program as smoothly as possible.

REVIEW: NONPROFIT ACCOUNTING SYSTEMS

QuickBooks and Xero Offer Some Nonprofit Tools

We generally think that software designed specifically for nonprofits is usually a better solution for nonprofit organizations, even if you're just beginning a venture into the nonprofit realm. While some nonprofit software applications are priced out of a smaller nonprofit's budget, others are priced comparable to the more generalized small business solutions from QuickBooks Online and Xero, and offer the features that nonprofit organizations need such as fund accounting, donor management, and grant management.

One major advantage to QuickBooks Online and Xero is that they are so widely used, that finding users with experience in those systems is very easy. However, while they both do an admirable job of managing standard financial transactions and organizational management functions, neither offers true fund accounting, which is what most nonprofit organizations, both large and small, really need. However, either product is a better option than not utilizing accounting software at all.

Read our overview of the nonprofit management functions in QuickBooks and Xero.

- QuickBooks Online
- Xero

And be sure to check out our review section on accounting systems designed specifically for nonprofits.

QuickBooks Online Nonprofit Features

<https://quickbooks.intuit.com/online>

QuickBooks Online allows users to choose 'nonprofit' as the business type during setup, but aside from slight differences in account names, there is no difference in software functionality from a for-profit setup.

Users are able to create custom accounts to track funds or grants by adding a sub-account number, which is the same process used if tracking departments. It does a good job of tracking various financial transactions with bank connectivity, as well as the ability to handle sales transactions. The customer option can track donors and donations as cash receipts or AR. There is no real way to handle campaigns or other fundraising options within QuickBooks Online, though it does integrate with a variety of nonprofit apps, enabling users to import transactions.

Budgeting features are only available in QuickBooks Online Plus and Advanced versions, with budgets able to be created based on location, class, or customer, but multiple budgets cannot be combined. Users do have the option to export budgets to Microsoft Excel for further customization if necessary. Tracking of funds, programs, and grants is limited in QuickBooks Online, although the sub-account method is available if tracking is necessary.

QBO reporting options include nonprofit specific reports including Statement of Financial Position, Statement of Cash Flows, and Statement of Activities. Reports are easily customized and can be viewed, emailed to the recipient, exported to Excel, or saved to PDF.

QuickBooks Online is a good option for smaller nonprofits and currently offers four plans: Simple Start (1-user), which is available for \$12 a month; Essentials, which is \$20 per month for up to 3 users; Plus, which runs \$35 per month for up to 5 users; and Advanced, which is \$75 per month and supports up to 25 users. A 30-day trial is available. Several payroll systems can be added on.

Xero Accounting Nonprofit Features

www.xero.com

Xero is not designed for nonprofits, but can be used by smaller nonprofits. A cloud program, Xero includes a default chart of accounts with limited customization, making it difficult for nonprofits that need to manage numerous funds. It offers bank connectivity and handles multiple financial transactions including invoicing, bill payment, fixed asset tracking, inventory, cash receipts, and customer quotes.

Budgeting capability allows a new budget from scratch or copying. While only one organizational budget can be created, users can create unlimited secondary budgets; useful for managing funds or grants. Budgets can be exported to Excel. Xero does not offer donation or fundraising tracking, but integrates with third-party nonprofit applications that can be used to track donations, manage donors and pledges, and create campaigns. Users have the option to add a sub-account in order to track funds and grants, which is adequate for those tracking one or two funds or grants, but is not recommended for nonprofits that need to manage multiple funds or grants simultaneously.

Xero includes decent reporting capability. The product dashboard offers a good look at current financial status and is totally customizable, so users can view only the information they need. Xero recently added a Statement of Cash Flows to its list of available reports, and all standard financial statements are available in the application as well.

Xero currently offers three plans: the Early plan, which provides a limited number of invoicing, billing, and reconciliation transactions, and currently runs \$9 per month; the Growing plan, which includes processing for an unlimited number of invoices, quotes, bills, and bank transactions, which runs \$30 per month; and the Established plan, which includes the same features found in the Growing plan, along with multi-currency capability, expense management, and project tracking, and runs \$60 per month. Xero also offers a free 30-day trial so those interested can try out the product to see if it's a good fit for them.



Advance Your Clients' Mission with Industry-Leading Financial Software.

AccuFund helps nonprofit organizations streamline workflows, improve accountability, and deliver relevant reporting for better financial control.

Community services, human services, foundations, endowments, and arts organizations all use AccuFund financial software to:

- Make better decisions with real-time dashboards and reports
- Save time handling requisitions, approvals, payments, and fundraising
- Integrate seamlessly with CRM, case management, and other data systems

Deliver Solutions in the Cloud or On-Premise Free White Paper

Help ensure your clients are using the right financial management/ERP system to meet their needs. Learn about the 6 Key Factors when assessing financial management/ERP software in "*Cloud Vs. On-Premise, A Nonprofit's Guide to Selecting Accounting Software,*" a free white paper available at accufund.com/cloudvsnonpremisewp.

To help your clients advance their mission with AccuFund financial software, visit accufund.com or call 877-872-2228.



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HELP CLIENTS UNDERSTAND THEIR CASH POSITION AND MANAGE THEIR ENTIRE FINANCIAL FOOTPRINT IN ONE PLACE WITH QUICKBOOKS CASH FLOW

QUICKBOOKS® EMPOWERS ACCOUNTING professionals to provide their small business clients with the tools and resources they need to make smarter, more informed decisions, especially when it comes to their financial health. One of the most recent advances in helping clients be more liquid is QuickBooks Cash Flow, a new offering that allows businesses to see their money-in/money-out accounts in one place, delivering insights and forecasts into their current and future cash position.

Cash flow has always been a common pain point for small business owners and is top of mind now more than ever. For the first time, QuickBooks Cash Flow provides a platform where business owners and accountants can see and manage their clients' entire financial footprint in one place to be ready for the next pay run or prepare for times of uncertainty.

"The mismatch of working capital leads to challenges for small businesses, so QuickBooks Cash Flow is a tool that can centralize all cash management processes in one place," explained Rob Daniel, head of product for QuickBooks Cash Flow. "With this, accountants can now have more strategic conversations with their clients to help them plan for the future, and educating clients on cash flow is yet another way accounting professionals can serve as strategic advisors and scale their impact."

Machine learning powers QuickBooks Cash Flow and allows it to deliver customized insights, such as whether the client has enough money for payroll and working capital. With these insights, accounting professionals will be able to help steer their clients away from making mistakes in how they handle their cash.

QuickBooks is rolling out this feature on QuickBooks Mobile and QuickBooks Online throughout the spring.

WHAT THE FINANCIAL FOOTPRINT LOOKS LIKE

QuickBooks Cash Flow is made up of four parts:

QuickBooks Cash¹. QuickBooks Cash is an FDIC-insured business bank account that lives within QuickBooks Online. There are no monthly fees (ATM withdrawals and foreign transactions may include a fee²); instead, the client gets quick access to cash as soon as the money hits the account, and insights are delivered in the same place funds are accessible. QuickBooks Cash is

the default location for where funds will arrive when a small business receives sales revenue through QuickBooks Payments, and users can easily move the funds directly to an external bank account if they so choose.

Envelopes. Envelopes represent a way for clients to partition funds and separate money to save towards different goals. Money stays within the QuickBooks Cash account; however, when funds are moved into an Envelope, they are no longer spendable via the QuickBooks Debit Card (more on the card below) to protect against an accidental spend. And if a client decides that they no longer want to "hold" funds in an Envelope, the funds can easily and instantly be moved back into their QuickBooks Cash account. A business owner can add a name to the Envelope and then set goals, such as the amount and date for any purpose. For example, a client can create a "Payroll" Envelope that can only be used for payroll.

"With the Envelope feature, we've created a way for small businesses to be very conscious as to how they are spending their money," said Daniel. "You can move money around in real time, but the feature is designed to provide discipline in how the business is spending their money. One customer even called an Envelope 'You Never Know' to cover unexpected spending. Even though the issue was a surprise expenditure, the customer was covered with the money set aside in the designated Envelope."

QuickBooks Debit Card¹. This is a free, physical debit card that enables a small business to access funds as soon as the money hits their QuickBooks Cash account. The card includes free ATM withdrawals (up to 4x/statement cycle) at 55,000 locations nationwide.

Cash Flow Planner. The Cash Flow Planner gives business owners a full view of their current and future cash positions so they can make the

best decisions. Businesses can predict their cash flow up to 90 days out with accurate cash flow forecasts.

"The Planner feature projects out a business's future cash flow position to provide a holistic picture for the small business that no other provider can offer," said Daniel. "Through the use of machine learning to predict outcomes and decades of expertise in small business accounting, the Cash Flow Planner proactively alerts businesses to potential cash flow challenges and can provide suggestions on how to address them, helping business owners make the best decisions possible."

Cash Flow Planner will give small businesses access to these insights by analyzing all financial inputs to predict the business's cash flow over the next 90 days. Then, the Planner will proactively alert business owners when cash flow might become a concern. As the Planner continues to evolve, it will also be able to provide recommendations around how to navigate the situation. For example, the tool could predict and make an instant recommendation, such as, "You look like you will be short on your upcoming payroll; click here to get access to more capital."

LOOKING AHEAD – WHAT TO EXPECT IN THE NEAR FUTURE

As with all its offerings, Intuit will work to continually improve QuickBooks Cash Flow, bringing new features to the table. In the near future, small businesses can expect to see their money sooner with instant deposits/ACH funding, earn more benefits and rewards, and apply for a line of credit through the integration with QuickBooks Capital. ■

¹ Subscription to QuickBooks Online is required. Banking services provided by and QuickBooks Visa® Debit Card is issued by Green Dot Bank, Member FDIC, pursuant to a license from Visa U.S.A. Inc. Visa is a registered trademark of Visa International Service Association. Green Dot is a registered trademark of Green Dot Corporation. QuickBooks products and services are not provided by Green Dot Bank.

² Four free in-network ATM withdrawals per each monthly billing cycle, \$3 ATM withdrawal for out-of-network or after 4th free withdrawal of the month; 3% fee per foreign transaction.

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Mental Health and The Workplace

By Richard D. Alaniz, JD

EMPLOYERS TODAY ARE routinely confronted with employee medical issues that impact the workplace. Despite the ever-increasing focus on issues under the Americans with Disabilities Act (ADA), the Family and Medical Leave Act (FMLA) and their state and local counterparts, one employee medical issue that has received scant attention is mental illness.

The National Alliance on Mental Illness reports that 43.8 million people experience mental illness in a given year. Approximately 10 million will experience a “serious mental illness” that substantially limits one or more major life activities. It costs the U.S. economy over \$100 billion each year and can take a heavy toll on the person afflicted as well as on their family and friends. In many cases co-workers and the employer are also directly impacted.

The Equal Employment Opportunity Commission (EEOC) takes the position that a mental health condition does not have to be significant or permanent to qualify as a “disability” under the ADA. If the condition is limiting, it likely qualifies. As in the case of medical issues in general, many states have enacted regulations specifically regarding mental

disabilities that are similar to those under the ADA.

MENTAL HEALTH CONDITIONS

While distinct mental health conditions number in the hundreds, among the most common mental health impairments or disabilities that employers may confront are the following: Bipolar disorder; Post-traumatic stress disorder; Panic disorder; Borderline personality disorder; Obsessive compulsive disorder; Schizophrenia; and Major depression. It is reported that major depression is the largest cause of disability in the United States.

In California, which defines mental disabilities more broadly than the ADA, emotional illnesses and intellectual learning disabilities are included. This means that such conditions as

ADHD and dyslexia would qualify as mental disabilities under California law. The same is likely true in other states with employee-friendly laws that have defined “mental illness” for disability purposes.

Virtually all the conditions classified as mental illness may or do have symptoms that could impact an employee’s ability to perform the essential functions of their job. In many cases the illness manifests itself in conduct, behavior, or performance issues that affects their co-workers as well. Because such mental health impairments are almost always protected disabilities under the ADA and similar state laws, an employer must proceed cautiously in attempting to address these issues when they arise. Medical privacy rules similarly require discretion in addressing employee mental health conditions.

INQUIRIES TO EMPLOYEES

The EEOC has stringent standards regarding what and when an employer may ask an employee about information regarding an employee’s medical (mental) health. The four circumstances under which an employer may ask questions of an employee regarding a medical condition are the following:

- After a job offer has been made and if all applicants in a job category are asked for the same medical information;
- When an employee has requested a reasonable accommodation;
- When the employer is engaging in affirmative action regarding persons with disabilities; and
- When the employer has objective evidence that an employee is unable to perform their job or poses a safety risk because of their condition.

Employers sometimes become



aware that an employee may be suffering from a mental impairment or disability that is affecting the workplace through reports from fellow employees. In most cases some problem behavior or incident triggers a concern among co-workers that something is amiss with the employee. A major change in personality, such as from happy to moody, confrontational or argumentative behavior and similar uncharacteristic conduct may be signs of a problem. On some occasions the employee's supervisor may become aware of a problem when having to respond to complaints about an incident involving the employee.

The possibility that a supervisor or manager may encounter an employee mental health condition in the workplace underscores the need for the issue to be addressed in their employment issues training. Most companies seek to educate supervisors and managers regarding the appropriate response to ADA issues. Basic information on the proper response to an employee mental condition should be a part of work training.

The appropriate response to a potential mental health issue is to carefully gather as much information as possible while maintaining appropriate confidentiality and medical privacy. A human resources representative or appropriate member of management, working in conjunction with the plant nurse or a medical practitioner, should confidentially interview witnesses to the abnormal conduct.

These are not issues that should be permitted to become part of the shop talk. Once confirming information in the form of objective evidence of the questionable conduct is obtained, the employer may question the employee regarding the condition, if any, that is causing the problem behavior. Employers

can request disability information only if it is job-related and consistent with business necessity.

Therefore, there must be a reasonable basis to believe that the condition causes the employee to be unqualified for the job, requires a reasonable accommodation, or poses a direct threat to the health and safety of other employees. Given the sensitive nature of the issues, these types of discussions should occur in private, preferably including the medical review officer, plant nurse or safety professional if possible. It is quite common for the employee to deny that there is a problem.

The employer must nonetheless proceed without being confrontational. It is possible that mere questions about what could be causing the employee's behavior could trigger the problem conduct.

PERMISSIBLE ACTION

If it is determined that the employee's medical (mental) condition is limiting the employee's ability to properly perform his/her job or creating disruptions or safety issues in the workplace, especially if the employee denies there is an issue, the employer may require a fitness for duty examination. The examination must be "job related and consistent with business necessity."

A fitness for duty exam would also be appropriate if it appears that the employee's mental condition could pose a danger to the employee or co-workers. It is precisely in these circumstances that an established relationship with a medical clinic that is familiar with industrial medicine, and your specific jobs is most useful.

The medical professional conducting the exam should have available the employee's job description or at a minimum, the essential job functions. The employee's personal physician or medical provider

should be consulted for any input that may help in performing the assessment. If the exam does not totally disqualify the employee from employment, potential reasonable accommodations should be discussed with the employee in conjunction with the medical professionals involved.

If the employee does not have an on-going relationship with a personal physician or proper medical provider, referral to an Employee Assistance Program might be appropriate. When the interactive process to address the potential reasonable accommodations for the condition occurs, it should focus solely on the limitations on the ability to perform the job created by the mental condition and what accommodations might be available.

In some cases, prescription of medication or the modification of an existing medication regimen may be sufficient. Such action would obviously involve the employee's treating health care professional. In some cases, a job transfer, flexible scheduling, or modified break schedules, or some similar accommodation that does not create an undue hardship would permit the employee to continue working without symptomatic behavior.

There are some mental conditions that cause an employee to pose a threat of physical harm to fellow employees. Such behavior is sometimes manifested when a person suffers from a borderline personality disorder, bipolar disorder or schizophrenia. If the employee is not capable of performing the essential functions of their job without posing a threat to the safety of themselves or others, even with reasonable accommodations, the employer may have no choice but to terminate the employee. Taking such action should be rare and only come after all possible reasonable accommodations have been

considered and found unfeasible. Involvement of the medical professionals would be critical before reaching a termination decision. A combination of leave along with a regimen of appropriate medication are often the types of reasonable accommodations recommended by the treating physicians before a termination decision is needed. The ultimate goal and concern should be the well-being of the employee. If medically supervised leave, even for an extended period would enable the employee to improve and possibly return to work, it could be the best course of action.

CONCLUSION

Each year employers are confronted with an increasing number of interactions where the ADA and/or FMLA are implicated. It is likely that some may involve cases of employee mental illness. The best course of action for employers is to be cautious and patient all times in addressing mental health issues in the workplace. The issues are highly personal and can be complex. ■

Richard D. Alaniz, J.D., is a partner at Alaniz Law & Associates, a labor and employment firm based in Houston. He has been at the forefront of labor and employment law for over forty years, including stints with the U.S. Department of Labor and the National Labor Relations Board.



Rick is a prolific writer on labor and employment law and conducts frequent seminars to client companies and trade associations across the country. Questions about this article, or requests to subscribe to receive Rick's monthly articles, can be addressed to Rick at (281) 833-2200 or ralaniz@alaniz-law.com.

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HOW DOES INTUIT SUPPORT ACCOUNTING PROFESSIONALS?

Intuit is a mission-driven, global financial platform company that serves 50 million customers worldwide, and we believe everyone should have the opportunity to prosper. We support over 1 million accounting professionals through QuickBooks Online Accountant (QBOA), the one place where they can manage all their clients and work - from books to taxes, payroll, payments and more. More than 60 percent of small businesses are connected to their accountants through QuickBooks, and with our ProAdvisor program, we're making over a thousand connections between small businesses and accountants every day.

Over the past 25 years, we've worked to understand accounting professionals and their needs by studying industry trends, listening to our accountant and bookkeeping partners, and leveraging cutting-edge technology to bring new, innovative solutions to market so that accounting professionals can spend more time as strategic advisors to their clients, growing their practices and scaling their impact.

Today, helping accounting professionals and small businesses succeed has never been more important as we navigate the challenges resulting from the coronavirus. We continue to provide our accountants and their clients with tools, information and resources — from Intuit Aid Assist (<https://aidassist.intuit.com/>) to our accountant resource site (<https://proconnect.intuit.com/coronavirus/>) — to support them during these unprecedented times.

MARKETS SERVED:

Our portfolio serves small businesses and accountants worldwide, including the U.S., Canada, the United Kingdom, Australia, France, Brazil, Israel and India.

HOW DOES INTUIT INCORPORATE THE VOICE OF THE ACCOUNTANT COMMUNITY INTO ITS PRODUCTS?

We listen closely to our accounting partners, regularly asking for their feedback on how we can improve their QuickBooks experience. We do this through a few key touchpoints. First, there's our Accountant Council, a group of forward-thinking, tech-savvy accounting professionals that we bring together twice a year at an Intuit location to share their thoughts on products and the future of the industry. We also offer accountants early access to test new experiences and provide feedback for future development, as well as in-product surveys to understand areas for improvement among our existing offerings.

Additionally, we ensure there is an option to provide feedback on every product page designed. We read every submission, listen to all the comments and then implement that feedback to deliver better experiences for accountants and bookkeepers, and the small businesses they serve.

CAN YOU SHARE SOME RECENT EXAMPLES WHERE INTUIT HAS INCORPORATED ACCOUNTANT FEEDBACK?

Absolutely. As a result of feedback received this year, we've launched more updates in the past six months than ever before. A few that we are most proud of are:

- Smart page breaks that allow accountants to email, export, and print professional, client-ready reports
- Updates to our Client Overview feature in QBOA that provides a picture of clients' financials, going back further than one year

PRODUCTS:

Intuit is a mission-driven, global financial platform company that gives everyone the opportunity to prosper. We're the proud makers of TurboTax, QuickBooks, and Mint. Our products and services help more than 50M people around the world put more money in their pockets, with less work and greater confidence.

intuit®

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PHONE: 650-944-6000

WEBSITE: www.Intuit.com

NUMBER OF EMPLOYEES: 9,000 worldwide

YEAR FOUNDED: 1983

- The ability to respond to Find-a-ProAdvisor leads within QBOA, connecting more accountants with small businesses that need their support more than ever before

HOW DO YOU BELIEVE TECHNOLOGY WILL IMPACT THE ACCOUNTING PROFESSION NOW AND IN THE FUTURE?

Technology will continue to be a tool that accounting professionals use to deliver better service and meet the evolving needs of clients. There are a few major shifts I see on the horizon. For example, I believe compliance automation will reduce the amount of time and effort it takes to collect and input data, giving accountants more time to act as strategic advisors. Additionally, I see increasingly smart data outputs enabling accountants and their clients to better understand the state of their financial lives. Overall, operational efficiency will continue to increase because of technology, eliminating much of the work that was once required to manage work.

We have seen accountants embrace technological advances every step of the way, and we know they will continue to search for new ways of automating processes in order to deliver more strategic value for their clients.

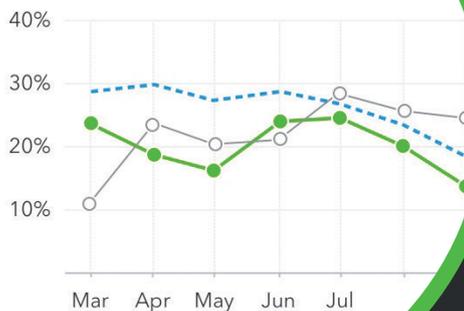
Ariege Misherghi Global Leader, Accountant Segment, Intuit

Ariege leads the Accountant Segment at Intuit, which is focused on helping Intuit's accountant partners with elevating their practice and serving their clients in new and innovative ways. Ariege is responsible for leading a team focused on helping accountants grow their practice and scale their impact through innovative products, services and programs. Her areas of focus include QuickBooks Online Accountant and the Global QuickBooks ProAdvisor Program.



See trends, then set them

—●— Last 12 months —○— Previous year



The business performance dashboard gives your clients a look into the future – and the data to back it up. It turns rows of complex data into easy-to-read charts and actionable metrics. And with the powerful industry benchmark comparison feature, you can measure performance against businesses in your client's industry and location, delivering smarter insights and revealing a path for growth.

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WHO'S WHO

AMONG THOSE SERVING THE TAX & ACCOUNTING PROFESSION

2020

ADVERTORIAL



PHONE: 888-760-9990

E-MAIL: ContactUs@AccountantsWorld.com

WEBSITE: www.AccountantsWorld.com

FOUNDED: 1999

COMPANY OVERVIEW

AccountantsWorld. Genuinely committed to accountants.

Accountants have lost control of their two core business services – accounting and payroll – no thanks to solutions that are being sold directly to their clients.

Over 15 years ago, AccountantsWorld made a genuine commitment to bring that control back to accountants, where it belongs.

That's why we created a fully-integrated suite of award-winning, cloud-based professional solutions that put accountants back in control of accounting and payroll services. With our Accountant-Centric solutions, you can best serve the unique needs of each client and achieve unprecedented profit margins.

WHO WE SERVE

The primary customers for other accounting and payroll solution providers are your clients. You're their secondary customer and an important marketing channel. But at AccountantsWorld, professional accountants like you are our only customers. We never compete with you or sell our solutions directly to your clients.

This unique commitment to accountants has enabled us to deliver major breakthroughs to the accounting profession.

OUR PRODUCTS

AccountantsWorld offers the first fully-integrated suite of cloud solutions for accountants. This suite includes solutions for:

- Bill payment and Client Accounting Services
- Write-up and trial balance
- Live payroll
- After-the-fact payroll
- Document management and client portals
- Practice management
- A professional website for your firm

OUR FLAGSHIP PRODUCTS:

Accounting Power. Accounting Power is the first cloud-based professional accounting system created with just one focus – to give accountants full control over their accounting practice. Accounting Power includes write-up and trial balance capabilities, fully customizable financial statements, financial ratios, a dashboard, and consolidation.

Accounting Power also includes bill payment, A/R, A/P, job costing, and inventory.

Thanks to its remarkable capabilities, Accounting Power allows you to offer both highly profitable write-up and Client Accounting Services.

Payroll Relief. In 2004 we created Payroll Relief - the first cloud-based payroll processing system – to help accountants offer highly profitable payroll services with virtually no compliance headaches.

Payroll Relief delivers what it promises. In a recent survey, 55% of Payroll Relief users reported more than a 50% improvement in their practice, and 78% reported at least a 25% improvement in their practice after moving to Payroll Relief. Rated five stars by *CPA Practice Advisor* for five years running.



After-The-Fact Payroll. Built on the same platform as Payroll Relief, After-The-Fact Payroll is the industry's most fully-featured cloud-based system for payroll compliance.

CUSTOMER SUPPORT

Our entire team is committed to providing exceptional customer service for all our solutions. Customers receive personalized service from Practice Development Consultants, ready to help with onboarding and data migration. We also offer free unlimited technical support, as well as free webinars and training so you can make the most of your partnership with AccountantsWorld.



Take charge. Your practice demands it.

For too long, accountants had given control of their core services - accounting and payroll - to companies whose software was created specifically to diminish the role of accountants.

But what if there was a better way?

What if there were revolutionary solutions to help accountants take back control from larger organizations and subpar software? What if those solutions came from a brand whose sole mission was a relentless commitment to accountants?

AccountantsWorld is that brand. For over 20 years, industry professionals have turned to us because we are known for providing a unique combination of advanced cloud accounting and payroll solutions alongside business insights that empower accountants and CPAs to take back control.

The time has never been better to do what's best for you and your clients - now that you have the support you need.

Visit AccountantsWorld.com/CPA to learn more.





PAUL McDONALD
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How Financial Transparency Can Level Up Business for Private Companies

HOW MUCH FINANCIAL information do you share with your employees, and should you be sharing more? These are important questions, but up until a few years ago, few private companies were asking them. After all, the SEC doesn't typically require businesses that are privately owned to disclose financial results to the public, including their employees. If financial transparency was raised at all within these companies, it was more likely to be about the risks than the opportunities.

Today, the reverse may be true. In a recent Robert Half survey, 88% of CFOs revealed that their organization shares financials with at least some employees. That's a striking 31-point increase from a similar survey conducted in 2016. Employees are enthused about transparency, too, with 82% claiming to be interested in their company's financial performance.

WHY IS FINANCIAL TRANSPARENCY IMPORTANT?

One case for financial transparency is that if everyone else is doing it, so should you. And there's little doubt that employees and job seekers are gravitating towards firms that share data such as earnings forecasts with their staff. But the case for opening your books to workers goes beyond recruiting new staff. Transparency, among other things:

- **Motivates employees** — Open sharing of information helps workers see how their roles mesh with the company's broader mission and strategy, creating a culture in which they are partners in a business's success. When employees know "how we're doing" as an organization on a macro level, they can more easily see on their level how they can contribute toward better and better results. It gives them more reason to want their company to

succeed because they have a clearer part in it.

- **Builds trust** — Even companies in favor of transparency may worry about how their employees will interpret the data. What if a disappointing quarter causes panic, or an encouraging one fosters complacency? These are genuine risks, but the rewards of transparency are real too. Sharing financials sends a powerful message that you have faith in your employees' good judgement and ability to see the bigger picture. Trusting staff to discretely handle data they receive prompts them to trust their employer in return.

- **Fosters new ideas** — Managers asking workers for good ideas is nothing new, whether it's about trimming waste or streamlining the workflow on the shop floor. But it's hard for employees to pitch in effectively if they lack the underlying data that drives decisions. If you give workers the vague outline of a problem, don't expect more than the vague outline of a solution. But if you give them hard numbers — a set of disappointing sales figures, say — you may prompt them to start tracking these metrics and brainstorm ways to make them move in the right direction.

- **Improves customer relations** — How many times have you been frustrated with employees who

replied, "That's not my job" or "I don't know anything about that" in response to a customer query? Before putting this down to poor attitude, consider how the same workers might handle the situation if they felt like partners in the company's overall mission, rather than cogs in a larger wheel.

- **Helps your bottom line** — There's a reason more companies are opening their books to employees: it's good for business. Giving staff the information they need to track each dollar spent improves your chances of cutting costs and boosting profits.

TIPS FOR SHARING INFORMATION

Companies are right to be wary of revealing too much, too soon, if only because few employees want to be bombarded with raw financial data. So you need to carefully prep your sharing strategy, including creating a context around financial data workers can understand. Here are some ideas:

- **Decide what to share.** You don't have to give them a list of every single financial detail. This could overwhelm employees without a financial background. Be selective in what information is revealed, and who it's revealed to. This will obviously vary from company to company. One useful tip is to identify subjects employees are

commonly misinformed about and use transparency to correct the record. For example, if your workers only hear the headline figure for last year's profits, they may assume the company is flush with cash. Educating them in what's being reinvested, or used to pay down debt, will give them a proper context for the company's strategy.

- **Stick to a schedule.** Come up with a frequency (quarterly, twice a year, annually) for employee updates and let staff know in advance when and how they can expect to receive them. Don't shy away from transparency if the news isn't as good as you were hoping for.

- **Speak plain English.** Not everyone can read a spreadsheet, and financial jargon can sound like ancient Greek even to well-educated people. Define important terms or acronyms, explain vital data in layperson's terms and even consider offering some financial literacy training if needed.

- **Invite a dialog.** Ensure staff you are available to answer questions and address concerns they may have.

Making financial transparency a priority is a challenge for any business, requiring both management and staff to step outside their comfort zones. But if you provide regular, well-explained data, you may soon be wondering why you ever did things differently. ■



AMY VETTER, CPA, CITP, CGMA
Mindful Technologist &
Keynote Speaker
@AmyVetterCPA

MEANINGFUL *Mentorship* STRATEGIES



AT THIS POINT, “mentorship” has become a business buzzword akin to “disruption” or “deliverable.” People love to discuss the importance of mentorship, but they’re less keen on doing the nitty-gritty work it takes to develop a successful mentorship program in their own workplace. Mentorship shouldn’t be haphazard; it should be systematized, and it should be valuable for team members and firms alike. In order to achieve those goals, both mentors and mentees need to approach the relationship with good faith and earnest effort to make a meaningful professional connection.

process of creating a program for your firm, remember to keep these characteristics in mind.

FOR MENTORS:

Being a mentor in an official capacity is not a role to be taken lightly. The first requirement of a good mentorship program is to find mentors who are willing and eager to be involved and engaged. If you or another leader at the firm doesn’t want to be a part of it, they shouldn’t, because being a half-hearted mentor is often worse than not being one at all. As a mentor, you have to take an active role in providing professional development to your mentees. You have to be there to answer questions, share your story, and provide guidance in times of need.

You also have to be willing to listen. One of the aspects that separates mentorship from simple training or management is that it

actively invests in its recipients. You can’t successfully mentor somebody if you don’t take their needs into account. If you don’t solicit feedback from your mentees, you don’t know if you’re providing them any value. While a mentor-mentee relationship is obviously a hierarchical one, it should include plenty of open and honest exchange between parties.

FOR MENTEES:

On the surface, being a mentee is a pretty simple gig. You show up, you get some wisdom, and you advance in your career. What could be simpler than that? Showing up may be all that it takes to be a mentee, but it won’t make you a good one. If you aren’t dedicated to receiving mentorship, you won’t get much from the relationship except something to bring up during your yearly review.

The people who get the most out of mentorship programs are those who participate as actively as pos-

sible. Don’t be afraid to discuss any number of issues with your mentor, from questions directly related to your job to broader big-picture concerns. You should also be open and vulnerable, even when it’s difficult. Your mentor is somebody who’s there to provide an experienced set of eyes and a steady hand, so you shouldn’t ever be afraid to engage them. Talking about your fears, hopes, and aspirations is what having a mentor is for.

FOR EVERYONE:

Whether you’re a mentor or mentee, you’ll benefit from approaching the relationship with a positive perspective and the desire to build a meaningful bond. When done right, mentorship programs can provide a kind of value that may not show up on the balance sheet, but will make a huge difference in the lives of both parties. ■

There are all sorts of reasons (www.cpapracticeadvisor.com/12176118) why you should consider adding a mentorship program to your workplace, but this article is more interested in the how, specifically how mentors and mentee should view the nature of their role. If you are part of an informal, outside-of-work mentorship relationship, these tips will still be immensely helpful to you. If you’re building a structured mentorship program inside your organization, they could be the difference between success and failure. Whatever the nature of the program you create, it won’t work unless people understand the parameters of being a mentor or mentee.

Whether you’re already participating in mentorship or in the



Apps For Working From Home

SINCE SO MANY of us are now working from home, we thought it would be appropriate to survey members of the *CPA Practice Advisor* community to find out what apps they are using to make working from home more effective.

Earlier this year we covered **meeting and calendar apps** (www.cpapracticeadvisor.com/21124539), and many of our readers agree that those apps are helping them manage their businesses from outside the office, so you might want to start there. And then, we hope that some of these suggestions will be useful to you.

Sandra Wiley, president of Boomer Consulting, offered several suggestions:

- **HyVee and Dillons**: Our local grocery stores that are delivering and/or offering pickup services. No need to go into the grocery store!
- **EatStreet**: Home delivery of all kinds of food in our community. Most are just leaving it at the front door and no need to see a person.
- **HelloFresh**: Delivery of food to fix in our home. I love this service. We get great recipes and all the ingredients we need
- **IMBD**: I can check out movies before I watch them. :-)
- **Wayfair** and **Amazon**: I still need to shop and right now I am doing lots of home projects. :-)
- **WhatsApp** and **Facetime**: So I can still socialize while giving everyone their Physical Distancing!

Randy Johnston, executive vice president at K2 Enterprises and CEO/founder of Network Management Group, Inc., also presented us with an array of suggestions:

Proper Pandemic Preparedness planning would have had these tools in place:

- Remote access with **Citrix**
- VOIP system with either hardware handsets or softphone software
- MFA – Cisco DUO
- Office 365, using **Teams**
- Workflow software to coordinate among team members

In effect, with proper planning, full remote access with security should have been in place.

- For those who had not planned for the pandemic environment and desire interaction, I recommend **Seesaw**. This tool is far better for remote instruction than the traditional Zoom, GoToWebinar tool in areas like dance or the arts.
- For professional webinars that need interaction, you can use **ON24**. However, one of the best tools

available right now is from **Refined Training** from Refined Data, which enhances Adobe Connect.

- A tool that is very helpful in this new virtual world is the **TechSmith Bundle**, which has both Camtasia and Snagit. I think these products are mandatory for non-graphics professionals to produce higher quality webcasts and graphics.

Jackie Meyer, CPA, CTS, CTC, CEO and founder at Meyer Tax, said, “**Instant Messenger** is the end all app for working from home. It helps the team stay connected, have comradery, brainstorm, be thankful, and communicate information quickly and effectively. Your phone system may offer instant messaging options, like Glip with our ring-central subscription, or Slack is the most popular platform at the moment. Use the away and busy statuses while time blocking other priorities as to not let messages overwhelm you.

Sarah Elliott, CPA, PCC, co-founder and principal at Intend2Lead, LLC, shared these suggestions:

- **Insight Timer** – I adore this app and use it every single day! It has a timer feature for silent meditation and thousands of guided meditations that help with anxiety, stress, relaxation, sleep and more. I think we could all use some support with this these days!
- **Down Dog** – They have some awesome yoga and work-out apps that I love – Yoga, HIIT, Barre and 7 Minute Workouts. You can customize your workout based on skill level, intensity, focus areas, duration and more. An added bonus: they’re offering free access to everyone until May 1st so you can stay healthy and well!

Megan Lewczyk, CPA, said, “One of my clients, **Beech Valley Solutions**, is a tech-enabled staffing firm platform that specializes in remote and gig work, and now that’s more important than ever. Businesses need advice and may not know where to look for the best accounting, finance, or IT professional. There are projects and needs that businesses didn’t even imagine would be a concern a month ago. Beech Valley is a great resource during this very uncertain time and can match people quickly.”

Garret Wagner, CPA, CITP, founder/CEO of C3 Evolution group, tells us, “My most used app right now is **YouTube**: for some working from home

break and a little mid-day entertainment.”

Brian Friedman, director at EisnerAmper, said, “I love **Twitter**. It’s my news and entertainment all wrapped into one that provides me an up to the second pulse on the things that matter to me.”

Rick Telberg, president and CEO of CPA Trendlines Research and Bay Street Group, LLC, recommends using **Alexa**: “She makes a great secretary, reminding me of appointments and to-do items. And she has a some really bad jokes. Say, ‘Alexa, tell me an accountant joke,’ or, ‘Alexa, tell me a lawyer joke.’”

Stacy Kildal, owner of Kildal Services, LLC, uses **Upwords 2** for break time: “Back in the mid 2000s, my best friend and I played Email Upwords. It was amazing, but alas! they shut down the server. Behold – we now have Upwords 2 for mobile! Available for iPhone and android. It’s so great to take a quick break from work and take my turn! (For the record, Gail Perry has repeatedly beat me.)”

Kevin Bong (full disclosure – he is co-founder of AuditFile) suggests, “**AuditFile** which is 100 percent cloud based. Right now we are offering free Premium Support for 1 year! (\$1,500 value) with unlimited 1-on-1 onboarding and support sessions. Moreover, users can speak with a dedicated CPA with 35+ years audit experience for free. We are also bumping everyone to free unlimited cloud storage to help all those working remotely!”

Caleb Jenkins, leader of client accounting services at RLJ Financial Services, Inc., shared these apps:

- Breaking Headlines: **Apple News** gives a great assortment of the breaking headlines.
- Music: **Spotify** gives the ability to play my predefined playlists of music.
- Food Delivery: **DoorDash** gives me the ability to schedule delivery of my meals.
- Focus: **StayFocusd** gives me the ability to set time limits on various websites in order to get work done.
- Finances: **Apple Card** to manage personal spending.

Doug Sleeter, founder of Sleeter Consulting, wants to remind us to check out **Zoho Remotely** – all of its tools for working remotely are free to small businesses until July 2020. ■

Does Your Website Pass the Compliance Test?

By Becky Livingston

WHAT DO BURGER King, Harvard, and Hobby Lobby Stores, Inc. have in common? They have all been sued for their website's lack of meeting the Web Content Accessibility Guidelines (WCAG) in relation to the Americans with Disability Act (ADA).

Title I of the ADA indicates any business with at least 15 full-time employees that operates for 20 or more weeks every year is covered by the law. Title II refers to compliance for state and local governmental agencies. Title III states businesses that fall into the category of "public accommodation," such as hotels, banks and public transportation, are also required to comply.

If you (or your clients) meet any of those descriptions, is your website safe from a lawsuit? Here's how to tell.



WHAT IS WCAG?

The Web Accessibility Initiative states that it was "developed through the W3C process in cooperation with individuals and organizations around the world, with a goal of providing a single shared standard for web content accessibility that meets the needs of individuals, organizations, and governments internationally."

The Guidelines explain how website developers can make web content, such as text, images, sounds, structure, and presentation, more accessible to people with disabilities.

There are three acceptability levels for website compliance, including:

A = below average;

AA = standard (where most sites are and should be); and

AAA = exceptional.

DANGERS OF NON-COMPLIANCE

In addition to a potential lawsuit for your firm, there is also the risk of damaging your firm's reputation, brand, and sales.

COMPLIANCE CHECKLIST

In short, there are four things to tackle when it comes to WCAG compliance. They are:

1. Fix your website in accordance with the guidelines.
2. Test the site with persons with disabilities.
3. Reduce or eliminate your site errors.
4. Write a robust, custom web accessibility policy.

For an in-depth checklist, view "The Ultimate ADA Website Compliance Checklist: 2020 Edition," by Glenmont Consulting. It covers website presentation, content alternatives, individual user control, website usability, assistive technology considerations, and customer support recommendations.

HOW TO TEST AND FIX YOUR WEBSITE

Free and simple-to-use tools like WAVE and SortSite allow you to enter a webpage URL for scanning. Both tools do a good job of listing errors, warnings, and accessibility features found on the page. Each also has a paid version allowing you to scan a full site and to gain access to reports.

Developer-focused tools like aXe, Pa11y, and tota11y require coding knowledge to implement and to use them successfully. They, too, are efficient scanning and reporting tools. However, they may be difficult to understand if you do not have website coding skills.

If you have a WordPress site, there are a

many plugins already on the market that work well, including WP ADA Compliance Check Basic, Accessibility by UserWay, and WP Accessibility. They are free to install; but, it does take time to decipher the results and correctly implement changes.

IT'S YOUR CALL

If you're launching a new website or redesigning an existing one, consider adding this to the developer's task list.

If you do not plan to update your site, think about how this risk could derail sales and tarnish your firm's reputation. Then decide if you should test a few, important webpages to determine if revisions are needed. ■

Becky Livingston has over twenty-five years' experience in marketing and technology in financial services and engineering firms. She is the President and CEO of Penheel Marketing, a boutique marketing firm specializing in social media and digital marketing for CPAs. In addition to being a marketing practitioner, Becky is also an adjunct professor, author, and speaker. With a graduate degree from Pace University in Information Systems, Becky also holds undergraduate degrees from two other colleges and also has a Certificate in Corporate Training from NYU. She is also an active member of the Association for Accounting Marketing (AAM). Connect with Becky's firm on Facebook, LinkedIn, Google Plus, Pinterest, and YouTube.

COMPLIANCE CHECKLIST

- Fix your website in accordance with the Guidelines
- Test the site with persons with disabilities.
- Reduce or eliminate your site errors.
- Write a robust, custom web accessibility policy.

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THE RESULTS ARE IN: READERS' CHOICE AWARDS 2020

By Isaac
M. O'Bannon

TECHNOLOGY HAS PLAYED a vital role in the evolution of the accounting and tax profession over the past 30 years. Fortunately, accounting firms have largely embraced hosted and cloud-based systems that are making it easier for their staff to work remotely during the current Coronavirus pandemic.

These remotely-accessible technologies have reached into virtually all of the service areas that firms offer, as well as the management systems used by firms internally and for productivity. Likewise, many firms have helped their clients adopt cloud technologies that enable accountants to access live data

without transferring files or office visits.

CPA Practice Advisor Readers' Choice Awards, now in their 16th year, give our readers the chance to spotlight the technologies they most respect and trust to provide client services, to manage their firms, and to help their clients run their businesses. From online programs for tax and accounting functions, to document automation and workflow management processes, as well as tools for collaboration, mobile productivity and office hardware.

The awards also let professionals see the technologies and best workflow practices their peers are using, which can help them stay competitive in the constantly-evolving tax and accounting space. Thank you to the thousands of readers who participated in voting this year. Now, on to the results!

IN-FIRM TECHNOLOGIES

FEDERAL/STATE INCOME TAX PREPARATION

INSIGHT: Always our most active category, nearly all of this year's Readers' Choice voters reported using or recommending a professional tax system. Drake Software has consistently dominated this and other tax-related categories in the annual awards, and they did so again this year, thanks in large part to the company's very active and loyal customers.

Drake Tax Software: 40%

Intuit Lacerte, ProSeries or TaxOnline: 23.2%

Thomson Reuters UltraTax or GoSystem RS: 8.8%

Wolters Kluwer CCH Small Firm Services ATX or TaxWise: 8%

Wolters Kluwer CCH Axxess or ProSystem fx: 6.4%

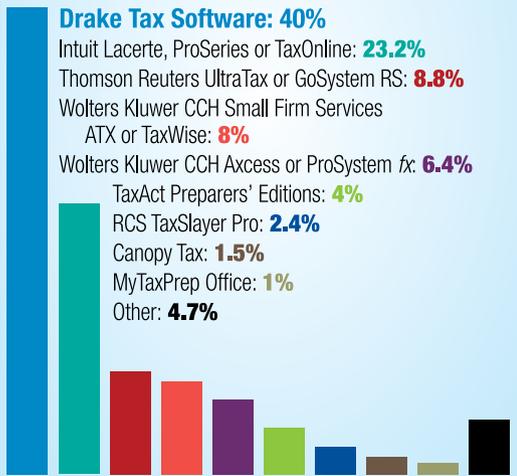
TaxAct Preparers' Editions: 4%

RCS TaxSlayer Pro: 2.4%

Canopy Tax: 1.5%

MyTaxPrep Office: 1%

Other: 4.7%



TAX PLANNING SYSTEMS

INSIGHT: With major tax law changes coming almost annually (and certainly in the forecast for this turbulent year), tax planning is very valuable to clients, helping to identify potential issues that result in direct, identifiable tax savings that clients see and appreciate. These systems go far beyond what tax preparation systems can do when it comes to creating hypothetical situations based on current and projected tax law, phase-ins and outs, and life event changes such as variations in income, college and other family matters.

WINNER: Drake Tax Planner (45.6%)

RUNNERS UP:

- Intuit Lacerte Tax Planner (24.7%)
- Thomson Reuters Checkpoint or Planner CS (10.2%)
- Wolters Kluwer CCH ProSystem fx Planning and fx for Small Firms (6.9%)
- Bloomberg TaxWincome Tax Planner (6.7%)
- Other (5.9%)

SPECIALTY SYSTEMS & TAX PREP TOOLS

INSIGHT: Some firms have additional needs when it comes to taxes, whether for uncommon returns or for their practice's workflow process. So, they turn to specialty systems.

WINNER: QuickBooks Self-Employed (23.2%)

RUNNERS UP:

- GruntWorx (19.5%)
- Canopy Tax Resolution Services (7.9%)

- Wolters Kluwer CCH ProSystem fx Suite Scan w/AutoFlow (7.8%)
- Wolters Kluwer CCH Axxess (7.6%)
- Thomson Reuters UltraTax CS Source Document (7%)
- SurePrep 1040SCAN & TaxCaddy (4.6%)
- Taxfyle (4%)
- Bloomberg Tax 709 & 706 Preparer (2.7%)
- Xero Tax Touch (1.1%)
- DynaTax (1%)
- Sageworks (1%)
- Other: (12.6%)

TAX DOCUMENT AUTOMATION

INSIGHT: These systems help tax firms do more with less, by removing much of the tedious data entry work. The data automatically flows into the tax prep system after it is scanned. Some of these programs also prepare digital workpapers.

WINNER: Intuit Tax Import for Lacerte & ProSeries (27.56%)

- GruntWorx Populate (26.73%)
- Thomson Reuters Source Document Processing & Workpapers CS (9.1%)
- Wolters Kluwer CCH iFirm and ProSystem fx Scan with AutoFlow (8.4%)
- Canopy Tax (8.3%)
- cPaperless (4.5%)
- SurePrep 1040Scan Pro, 1040Scan Organize (3.7%)
- Other (11.8%)

TAX & ACCOUNTING RESEARCH SYSTEMS

INSIGHT: Professionals can't prepare taxes or help clients plan for future scenarios unless they know some tax code and strategies. Of course, nobody can know everything, so it's important to have access to comprehensive tax research tools. This includes primary source material such as the federal tax code and state tax laws, as well as tax court rulings and expert analysis of these materials. Some of the available tax research systems integrate with tax preparation programs, while others are used separately and can be used alongside any system. TheTaxBook once again handily won this category this year for its popular and inexpensive system.

TheTaxBook – Tax Materials Inc.: 52.6%

Thomson Reuters Checkpoint (RIA): 9.7%

QuickFinder Tax Handbooks: 8.2%

Intuit Tax Research & TaxAlmanac.org: 5.5%

CCH IntelliConnect (Wolters Kluwer): 5.1%

Parker Tax Pro Library: 4.8%

TaxSpeaker: 4.2%

Bloomberg Tax Financial: 3.9%

Tax Talk Today: 2.3%

Other: 3.7%

SALES & USE TAX PREPARATION

INSIGHT: Trying to keep up with sales taxes can quickly become an overwhelming task, particularly with new rules relating to the U.S. Supreme Court's Wayfair decision. Many systems automate much of the compliance and reporting processes, including filing and payments. Most voters in this category (22%) said they use state tax agency websites or use the sales tax functions built into accounting systems (35%). However, among the votes for specific sales tax software, the results are:

WINNER: *Avalara AvaTax, Avalara Returns, or TrustFile (25.6%)*

RUNNERS UP:

• CFS Tax Software (11.7%)

• TaxJar (9.7%)

• Vertex Inc. (9.3%)

• Thomson Reuters ONESource Indirect Tax (9%)

• CCH Wolters Kluwer (SureTax/SalesTaxOffice/SalesTaxSaaS/STRO) (8%)

• Bloomberg Tax Sales Tax Rates (4.9%)

• eFileSalesTax.com (4.8%)

• Sovos Tax Solutions (1.1%)

• Other (15.9%)

SALES & USE TAX EXEMPTION CERTIFICATE MANAGEMENT

INSIGHT: Businesses who occasionally or routinely make sales to purchasers who are exempted from sales taxes can face another challenge that can lead to significant fines if the exemption certificates for those customers are not properly maintained. Although most firms in our survey did not express a preference or personal use with these products,

those who do voted as follows:

WINNER: *Avalara CertCapture (33.4%)*

RUNNERS UP:

• Vertex Inc. Exemption Certificate Manager (26.2%)

• Thomson Reuters ONESOURCE Exemption Cert. Manager (21%)

• Sovos Tax Solutions 5.9%

• Other (13.5%)

ACCOUNTING WRITE-UP SYSTEMS

INSIGHT: Write-up has been fundamentally changed by the increasing adoption of web-based accounting systems, but since small businesses are frequently victims of bookkeeping and employee fraud (and just bad bookkeeping), your business clients still need periodic review and reconciliation of accounts by a professional public accountant.

WINNER: *Intuit QuickBooks Accountant (53.8%)*

RUNNERS UP:

• Drake Accounting (17.3%)

• PC Software Accounting Inc. (7.5%)

• Thomson Reuters Accounting CS (5.2%)

• Xero (3.2%)

• Sage One (2.1%)

• Client Accounting Suite (Wolters Kluwer) (1.9%)

• AccountantsWorld Accounting Power (1.7%)

• UBCC Real Time Accounting (0.4%)

• CYMA Systems (0.3%)

• Other (6.6%)

AUDIT ENGAGEMENT TOOLS

INSIGHT: Audit engagements once took weeks or more, but now are much more streamlined thanks to automation and workflow tools, as well as other functions that provide for greater controls.

WINNER: *Thomson Reuters Workpapers CS, AdvanceFlow or Checkpoint (26.8%)*

RUNNERS UP:

• Wolters Kluwer CCH ProSystem fx Systems and ARM (20.2%)

• AuditFile (9.6%)

• Audit Confirmations (8.1%)

• Confirmation.com (7.4)

• CaseWare IDEA (5.2%)

• Teammate Analytics (3%)

• Capital Confirmation (2.6%)

• Audit Dashboard Automated PBC (2.3%)

• Wiley Advantage Audit (1.9%)

• Rivio Clearinghouse (1.5%)

• Other (11.4%)

FIXED ASSET MANAGEMENT

WINNER: *Thomson Reuters Fixed Assets CS (27.7%)*

RUNNERS UP:

• Intuit ProSeries Fixed Asset Manager (25.7%)

• Wolters Kluwer CCH ProSystem fx Fixed Assets & Fixed Asset Manager (13.2%)

• Sage FAS Asset Accounting (7.3%)

• Pro-Ware Asset Keeper (6.8%)

• Bloomberg Tax Fixed Assets (4.1%)

• Wasp Barcode Technologies (1.5%)

• Real Asset Management Inc. (1.2%)

• MultiView Asset Management (0.7%)

• Open Systems (0.7%)

• Other (11.1%)

BUSINESS VALUATION

INSIGHT: Accounting and tax professionals involved in business transfers, divorce litigation and family wealth planning often find a need for assessing the value of a business entity. This is, admittedly, a small niche among accounting firms served by a few technology vendors. About 10% of our voters had a preference in this category.

ValuSource Pro, BVM &

Express Business Valuation: 42%

SageWorks Valuation Solution: 22.3%

MoneySoft Corporate Valuation Pro, DealSense & Business Valuation Specialist: 14.7%

ValuAdder: 7.7%

Other: 13.3%

PAYROLL

INSIGHT: Payroll is the most outsourced business process, as evidenced by the sheer number of products in this category, and we couldn't even include them all. There are so many systems on the market that are designed for accounting firms or for small businesses to use directly. Cloud-based systems now automatically update payroll tax rates and other factors, even preparing monthly, quarterly and annual reporting, taking much of the pain out of payroll, making it much easier to keep employees and clients happy.

WINNER: *QuickBooks Payroll - by Intuit* (31.2%)*

RUNNERS UP:

• Drake Accounting (11.3%)

• ADP Payroll Solutions (10.7%)

• Paychex (7.3%)

• Gusto Payroll (7%)

• PC Software Accounting Inc. (6.1%)

• Thomson Reuters Accounting CS Payroll or myPay (4.3%)

• AccountantsWorld Payroll Relief (1.8%)

• AMS 1099-Etc Payroll (1.8%)

• Sage 50 (1.7%)

• SurePayroll (1%)

• OnPay (1%)

• Other (14.8%)

* QuickBooks Payroll - by Intuit includes QuickBooks Online Self Service Payroll, QuickBooks Online Full Service Payroll, QuickBooks Desktop Enhanced Payroll, and QuickBooks Desktop Assisted Payroll.

1099/W-2 COMPLIANCE

INSIGHT: Year-end payroll (and contractor) compliance systems that prepare W-2 and 1099 forms and can automatically file them, can help relieve much of the burden of processing hundreds or thousands of forms for your clients each year. Some systems also help streamline the entire process, including mailing of copies to recipients. Drake Accounting won this year's voting, with its integrated W-2 and 1099 compliance functions.

WINNER: *Drake Accounting (25.3%)*

RUNNERS UP:

- eFile4Biz (9.1%)
- Thomson Reuters Accounting CS Payroll Compliance (8.3%)
- AMS 1099-ETC (8%)
- Track 1099 (8%)
- W2/1099 (Wolters Kluwer ATX and TaxWise) (6.1%)
- EagleView (5.8%)
- 1099 Pro (5.5%)
- Greatland/Yearli (5.5%)
- Tenenz (4.3%)
- W2 Mate (Real Business Solutions) (3.9%)
- Payroll Compliance Reporting Wolters Kluwer (3.5%)
- AccountantsWorld ATF Payroll (2.5%)
- EG Systems (1.1%)
- Others (3.1%)

TIME & BILLING

INSIGHT: Managing time for firm staff and projects is critical for firm efficiency, with the end product of invoicing helping ensure steady revenue flow. Effective time management is essential whether firms bill by the hour for some projects or are strictly on a value billing method.

TSheets by QuickBooks: 42.9%

OfficeTools Workspace by AbacusNext: **12.1%**

Sage Timeslips: **10.5%**

Bill.com: **10.2%**

ImagineTime: **6%**

TPS Software: **5.3%**

AccountantsWorld Practice Relief: **4%**

PracticeEngine: **2.6%**

ClockShark: **2.3%**

Bill4Time: **1.7%**

Other: **2.4%**



PRACTICE MANAGEMENT

INSIGHT: We define practice management as those with more extensive functions for managing firm productivity and workflow management, automation of tasks, and record maintenance.

WINNER: *Thomson Reuters Practice CS (27.9%)*

RUNNERS UP:

- Wolters Kluwer CCH Axxess, iFirm or ProSystem fx Practice (21.3%)
- ClientWhys/TaxBuzz.com (15.9%)
- Canopy Tax Practice Management (15.1%)
- Karbon Workflow Management (7.8%)
- TaxWorkFlow (4.7%)
- BQE Core or Core AI (2%)
- Other (5.3%)

ONLINE INVOICING/

BILL PAYMENT SOLUTIONS

INSIGHT: Stand-alone invoicing tools can help firms with AR, while bill payment systems can help streamline AP.

WINNER: *Intuit Payments (43.5%)*

RUNNERS UP:

- PayPal (18.1%)
- Sage Payments (2.7%)
- Bill.com (15%)
- Bill & Pay (2.3%)
- Xero (7.5%)
- FreshBooks (1.6%)
- ReceiptBank (4.6%)
- CollBox (1.6%)
- Invoiced (2.7%)
- Zoho Books (0.4%)

CLIENT PORTALS

INSIGHT: Please don't send client invoices by email, as it's insecure and you could be breaking your state's privacy laws and face fines. Client portals make sharing data with clients easier, and make it easier for them to submit documents to the firm.

WINNER: *Drake Software SecureFilePro.com (35.5%)*

RUNNERS UP:

- Citrix ShareFile (12.4%)
- eFileCabinet SecureDrawer (9.7%)
- Thomson Reuters NetClient CS Portals or Onvio (7.4%)
- SmartVault (6.6%)
- ClientWhys/TaxBuzz.com (6.4%)
- Wolters Kluwer CCH Axxess Portal/ProSystem fx / iFirm (5.5%)
- Canopy Tax (4%)
- CPASiteSolutions (4%)
- cPaperless SafeSend Returns (3.4%)
- OfficeTools from AbacusNext (2.1%)
- AccountantsWorld CyberCabinet (1.3%)
- Other (1.7%)

DOCUMENT MANAGEMENT & DOCUMENT STORAGE

INSIGHT: There is a wide range of systems in this category, ranging from basic file folders, to advanced programs that include client collaboration tools, automatic archiving, retention functions and multi-worker productivity features.

WINNER: *Drake Document Manager (44.8%)*

RUNNERS UP:

- Thomson Reuters FileCabinet CS/GoFileRoom (12.4%)
- eFileCabinet (10.8%)
- Intuit ProSeries & Lacerte DMS (10.3%)
- SmartVault Document Storage (6%)
- ClientWhys/TaxBuzz.com (4.1%)
- Wolters Kluwer CCH Axxess or ProSystem fx Document (4%)
- OfficeTools WorkSpace by AbacusNext (2.8%)
- AccountantsWorld Cloud Cabinet (1.6%)
- Doc.IT - Doc.IT DM (1%)
- PaperlessPLUS (Wolters Kluwer) (1%)
- Other (1.2%)

OTHER DOCUMENT MANAGEMENT TOOLS

INSIGHT: Document management also requires special tools that sometimes work with the scanner or work with the document management system directly for functions including OCR.

WINNER: *Fujitsu (41.1%)*

RUNNERS UP:

- HP (19.3%)
- Nuance (7%)
- Canon (15%)
- Kofax (4.1%)
- cPaperless Tic-Tie-Calculate (10%)
- ABBYY (3.5%)

COMPREHENSIVE FIRM WORKFLOW SYSTEMS

INSIGHT: This category is divided into two groups: Comprehensive Workflow, and Other Workflow Tools, which are designed for aiding in specific tasks and engagements and for smaller firms.

COMPREHENSIVE WORKFLOW

WINNER: *Thomson Reuters Practice CS Project Management (29.5%)*

Runners Up:

- OfficeTools WorkSpace by AbacusNext (24.3%)
- Wolters Kluwer CCH Axxess or iFirm (17.8%)
- XCM Workflow (11.2%)
- TaxWorkFlow (9.5%)
- Pascal Workflow (5.3%)
- Autonomy iManage Workflow Manager (2.4%)

OTHER WORKFLOW TOOLS:

WINNER: *GruntWorx (19.4%)*

RUNNERS UP:

- eFileCabinet (12%)
- Intuit Tax Import or DMS for Lacerte and ProSeries (10.6%)
- Citrix ShareFile for Accountants (10.4%)
- Thomson Reuters GoFileRoom/Practice CS/Workpapers CS (8.7%)
- Bill.com (7.6%)
- Canopy Tax (5.6%)
- Expensify (5.4%)
- SmartVault (4.7%)
- Wolters Kluwer CCH ProSystem fx Systems (4.5%)
- OfficeTools WorkSpace by AbacusNext (3.8%)
- SurePrep (2.4%)
- Karbon Workflow Management (2.4%)
- Doc.IT (1.1%)
- Other (1.4%)

WEBSITE BUILDERS & SERVICES FOR ACCOUNTING FIRMS

INSIGHT: There are many tools out there that are affordable and make it easy to create (and maintain) a professional website for your firm.

WINNER: *CPA Site Solutions from ProSites (16.6%)*

Runners Up:

- GetNetSet (16%)
- Drake SiteDart Website Services (15.7%)
- CountingWorks/ClientWhys/TaxBuzz (14%)
- Thomson Reuters Web Builder CS (10%)
- AccountantsWorld Website Relief (7.1%)
- Tenenz AFSB or Integer (5.7%)
- Wolters Kluwer CCH ProSystem fx SiteBuilder (3.9%)
- Rootworks (3.7%)
- CPASites.com (3.3%)
- Build Your Firm (3%)
- Network Management Group (NMG) WebCare (1%)

FAVORITE CPE PROVIDER

INSIGHT: Whether keeping up on the latest change in tax, A&A, firm management or technology, earning CPE credit is mandatory for CPAs.

WINNER: *State CPA Societies/Other Professional Organizations (56.5%)*

RUNNERS UP:

- AICPA (13.2%)
- CPA Practice Advisor (10.6%)

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Lynn Blass, Operations Manager at LWBJ



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- Surgent CPE (5.5%)
- CPAcademy (4.5%)
- Canopy Tax CPE (3.9%)
- NASBA (3.6%)
- Becker CPE (2.2%)

HOW DO YOU PREFER TO EARN CPE?

INSIGHT: There are many ways to earn CPE: online, through conferences, through paid events, and via state societies.

WINNER: *In-Person Seminars/Conferences (34.8%)*

RUNNERS UP:

- Live Online Webcasts (31.2%)
- Self-Study with Tests (28%)
- Other (6%)

WHICH CONFERENCES DO YOU ATTEND?

INSIGHT: Although many may be postponed or canceled this year, professionals frequently attend conferences to learn of new tax and accounting laws and trends, firm management issues and technologies. Most voters (apx 64%) stated they attend state conferences or “other,” but of those who voted for a specific conference, the results are:

WINNER: *QuickBooks Connect (21%)*

RUNNERS UP:

- AICPA ENGAGE (Las Vegas) (12%)
- NAEA National Conference (11%)
- Scaling New Heights (8.7%)
- Thomson Reuters Synergy (7%)
- New York Accounting Show (6%)
- CCH Connections (5.5%)
- FICPA- Florida (5.3%)
- LA Accounting Show (4.5%)
- XeroCon (3.8%)
- AICPA Digital CPA (3.8%)
- ICPA Summit Chicago (2.8%)
- New Jersey Accounting Show (2.8%)
- Sage Summit (2.2%)
- Avalara CRUSH (1.7%)
- Toronto Accounting Show (1.1%)
- Sage Intacct Advantage (0.8%)

SMALL BUSINESS

ACCOUNTING SYSTEMS

INSIGHT: There are several sub-categories in this group: Below are the top vote-getters in each category.

SMALL BUSINESS ACCOUNTING

INSTALLED PROGRAMS

WINNER: *Intuit QuickBooks Desktop (76.9%)*

RUNNERS UP:

- PC Software Accounting Inc. (9.3%)
- Sage One, Sage 50 or Sage ERP (5.4%)
- Other (8.4%)

ONLINE SMALL BUSINESS ACCOUNTING

WINNER: *Intuit QuickBooks Online/Online Accountant (76.6%)*

RUNNERS UP:

- Xero (5.2%)
- Thomson Reuters Client CS or CS Client Access (2.4%)
- AccountantsWorld Accounting Power (1.6%)

- SageOne (1.6%)
- Sage Intacct (1.6%)
- NetSuite (1.3%)
- FreshBooks (1.2%)
- Other (8.5%)

EXPENSE AND TRAVEL MANAGEMENT

SOLUTION

INSIGHT: Travel and expense management is a critical financial management function in organizations. About 16% of voters claimed an alternate method (including spreadsheets), but of those who cast a vote for a true expense management solution, the results are:

WINNER: *Expensify (45.4%)*

RUNNERS UP:

- ReceiptBank (18.4%)
- Concur Expense (16.7%)
- SpringAhead (4%)
- Certify (2.9%)
- Chrome River (2.9%)
- ExpensAble (2.3%)
- ExpenseWatch (2.3%)
- Xpenditure (1.7%)
- ZohoExpense (1.7%)
- Tallie (1.1%)
- SutiExpense (0.6%)

RETAIL ACCOUNTING/POINT-OF-SALE SYSTEMS

WINNER: *Square (40.1%)*

RUNNERS UP:

- Intuit QuickBooks POS (36%)
- NetSuite OnSite POS (3.8%)
- Database Creations (1.9%)
- AddSum (1.3%)
- Cougar Mountain Denali (1.3%)
- Radiant Systems (0.9%)
- Vend POS (0.6%)
- Wasp Barcode (0.6%)
- Celerant Command Retail (0.6%)
- AccuPOS (0.6%)
- Other (12.3%)

NOT-FOR-PROFIT ACCOUNTING

WINNER: *Intuit QuickBooks Premier Nonprofit (69.8%)*

RUNNERS UP:

- Sage Intacct (6.2%)
- Blackbaud Financial Edge or Fundware (3.1%)
- Cougar Mountain FUND Suite (2%)
- Other (18.9%)

REMOTE TECHNOLOGIES

ASP/HOSTED SOLUTION PROVIDERS

WINNER: *Drake Hosted (40.1%)*

RUNNERS UP:

- Right Networks/Xcentric (18.9%)
- Thomson Reuters Virtual Office CS/SaaS (17.6%)
- AbacusNext Private Cloud and Cloudnine Realtime (6.2%)
- CPAASP/InsynQ (2.5%)

- Network Management Group Inc. (NMGI) (2%)
- Network Alliance Inc. (1.2%)
- Cetrom CPA Cloud (0.8%)
- Other (10.7%)

OUTSOURCED TECHNOLOGY SERVICES

INSIGHT: About 24% of survey takers state a preference for a solution or practice not on the list, and each year we add products to the list of which we were previously unaware. Of the votes for the solutions listed, the results are:

WINNER: *Right Networks/Xcentric (43.6%)*

RUNNERS UP:

- CPA2Biz Email Solutions (15.9%)
- InsynQ/CPAASP (8.9%)
- AppRiver (8.9%)
- CollBox (7.9%)
- Network Management Group Inc. (NMGI) (6.9%)
- Cloudnine Realtime by AbacusNext (6.9%)
- Cetrom (1%)

PERSONAL TECHNOLOGIES

SMART PHONE PLATFORM

- Apple (52.56%)
- Android (44.77%)
- Other (2.67%)

TABLET OPERATING SYSTEM

INSIGHT: We were surprised that 27% of voters stated that they “don’t use” a tablet computer. (Multiple answers were allowed on this question.)

- Apple iPad (36.47%)
- Android/Google/Chrome (22.54%)
- Microsoft Surface (9.62%)
- Other (3.92%)
- Don’t Use (27.45%)

DO YOU HAVE A SMART TV?

INSIGHT: If your tv has an internet connection or wifi capability and can run some apps, then it is some variation of a smart tv.

- Yes (63.31%)
- No (36.69%)

GENERAL OFFICE TECH

PRINTERS & SCANNERS

INSIGHT: Printers are needed even in the “paperless” office.

- HP (34.5%)
- Canon (12.9%)
- Epson (7.2%)
- Brother (20%)
- Fujitsu (10.4%)
- Other (15%)

OFFICE SUPPLY STORE

(Multiple answers were allowed on this question):

- Office Max/Depot (25.1%)
- Sam’s Club (7.7%)
- Staples (22.6%)
- Quill (6%)
- Costco (11.9%)
- FedEx Office 1.9%
- Best Buy (9.8%)
- Other (6%)
- Wal-Mart (9%)

OUT-OF-OFFICE

FAVORITE FORM OF PHYSICAL EXERCISE DURING TAX SEASON

WINNER: "Who has time to exercise?" (32.4%)

- Weightlifting (9.5%)
- Jogging/Running (8.9%)
- Bicycling (8.4%)
- Jumping to Conclusions (7.5%)
- Aerobics (7.1%)
- Yoga (6.2%)
- Aerobics (4.8%)
- Team Sports (2.2%)
- Racket Sports (1.4%)
- Other (11.6%)

HOW REMOTE ARE YOU?

How "remote" are you? How many hours per week do you work on client engagements or firm business while away from the office (at a client, at home or anywhere else)?

1. "My office is in my home or car:" 40.8%
2. Less than 1 hour per week: 20.3%

3. Between 1-9 hours per week: 17.7%
4. Between 10-19 hours per week: 9.3%
5. 20+ hours per week: 11.9%

HOW "SOCIAL" ARE YOU? WHICH SOCIAL MEDIA TOOLS DO YOU USE IN CONJUNCTION WITH YOUR WORK?

About half of our voters said they don't use any social media tools for business purposes. Of those who do, the breakdown is as follows (multiple responses were allowed):

- Facebook 22.6%
- Twitter 21.1%
- LinkedIn 9.3%
- YouTube 7%
- Instagram 7.1%
- Google+ 4.7%
- Pinterest 3%
- Don't use any social media for business 18.4%
- Other 6.8%

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Keeping Customer Satisfaction Simple: The A.S.K. Principal

INSTINCTIVELY, YOU PICK up the phone on the first ring. Instantly, you are taken aback by the angry voice on the other end of the line. You were not expecting this kind of call, and most certainly not from this client. After all, you did a great job preparing his tax returns—just as you have done for four straight years. So begins the first Monday of the month.

Can you relate to this feeling? Seems no matter how much history we may have with a client, no matter how well a job gets done, every dog has his day. We complete the task. We believe that we have provided service without error. But the client concludes a target was dramatically missed.

Ships pass in the night at companies large or small. Perceptions get misaligned across departments, various audit functions, and so on. Wherever and however these disappointments are generated, we are left to wait and wonder as the anger gets vented and conflict emerges—how, where, what and when things did things go wrong? What steps might I take next time to better understand this client's needs and avoid this horrible unpleasantness?

Do I need to update my resume?

CREATING CUSTOMER SATISFACTION

There is a way to deliver a more seamless experience. There is a simple trick to help us anticipate and stay ahead of these sorts of misunderstandings that blow out of proportion.

One thing we can do is to shift our focus toward seeking to understand the needs of others instead of making too many assumptions. Instead, we need to pause and clarify issues with the client, customer, co-workers, etc.

When it comes to understanding each person's needs, this isn't some-

thing that is limited to the partners and managers. All members of the team can do their part and embrace the concept of having an inquisitive mindset. The inquisitive mindset also appeals to millennials who have a natural drive for greater understanding and knowledge. They may not even have an ulterior motive; they just like knowing things to know them. As an added benefit of improved client relationships, you will engage your millennial-age associates like never before.

So, one way to defuse having one angrier client is to break the cycle doing the same old thing, changing our habits, and recognizing that these times, they are a-changin'. There's a handy acronym, A.S.K., that we can use. It helps to ask the right questions at the right time.

ASSESS

The first obvious step is taking time to understand the true needs of others.

- What are your goals, your concerns today?
- What do you want as the end result?

Too often we project our goals or those of the last client in the door in place of the client in front of us. For example, when completing a tax return, we may assume the client wants the return completely buttoned up. However, what this client really wants is to understand if moving expenses can be written off this year. The fact that their tax return gets completed ASAP is secondary. If moving expenses cannot be written

off, the client may want to invest time pulling out other receipts and discuss other itemizations that were less handy.

If we do not start on the same page, and assess what our client's true intentions may be, we are going to get that distasteful phone call. But asking a few simple questions from the onset gets us truly aligned with that client—and save everyone a lot of aggravation down the road.

SOLVE

The second step is being sure to solve the right problem. Because we first assess the situation, we are aiming to get to the bottom of the right problems. Now, we can use our knowledge and experience to solve the right problem. This second step enables us to shift into a truly advisory capacity as consultants, rather than backtracking later. You know what that sounds like: lobbing questions midway through the project as you discover the awkward truths about why you are really here and what the client really wanted.

Some start to blame the client. "Oh, why didn't you tell me?" As you may know, that kind of talk never goes over too well. The answer, of course: "Because you never asked. You never ask me anything."

But if we assess, we can solve and have a clear understanding of what we are being asked to solve

before we ever get started.

KEEP

As we move into the third and final step, we may be tempted to fall back into our own biases about what we are doing.

This final phase is where most go awry. We get pulled into the old temptations. The goal is to keep in mind our initial assessment and execute the correct deliverables.

Remember, this isn't about delivering what you think clients want or need—or even what you think is good for them, despite themselves. This is about communicating with them to understand what they need, advising and informing them on nuances and improvements, then going about creating the solution.

The A.S.K. method's simplicity helps us to truly serve others as trusted advisors. It will set you apart from the vast majority of accountants, for instance, as you shift focus from the technical to compliance services. And it vastly reduces those surprise, angry phone calls on a Monday morning. Try sharing the A.S.K. concept with those around you. Assess the needs, solve the problem, and keep those needs and solutions front and center as you communicate with your client. The impacts will astound you. ■



Which Health and Employee Benefits Attract Employees?

By Chris D'Ambrosio

IN A COMPETITIVE job market with up to five generations in the workforce, companies of all sizes must be able to attract and keep great people. That's where benefits come in. Is your benefits strategy relevant across multiple generations?

Employees looking for a new job, or considering whether to stay with their current employer, indicate that employee benefits offerings are very important in their decision. To learn more on this topic, ADP, in partnership with SourceMedia Research/Employee Benefit News, surveyed more than 5,000 employees of small businesses as well as employees open to new employment in businesses of any size. The research findings offer insights into which benefits have the most impact on employee attraction and retention and which benefits employees are most likely to use.

With the high cost of healthcare, it isn't surprising that 60% of employees named healthcare as the most important benefit they considered when deciding to accept their current job, far outpacing paid holidays (42%), paid vacation (42%), paid sick days (41%) and access to a retirement savings plan (39%).

COMPANY SIZE CAN PLAY A ROLE IN BENEFITS ACCEPTANCE

Employees of companies with fewer than 10 employees indicate that health insurance (64%), paid vacation/personal days (63%) and paid holidays (55%) would influence them to accept a role at a new company. Among employees of companies with 20 to 49 employees, 74% indicate that health insurance would influence them to accept a role at a new company, followed by paid vacation/personal days (66%) and sick days (62%). So, if you are a company with fewer than 40 employees and make the decision to offer health

benefits, you will be meeting a need that is currently unmet for a large number of job seekers, helping you boost your ability to attract and retain top talent.

There are generational differences in what employees want in a benefits package. For instance, only 57% of younger employees—with presumably fewer health issues—rank health insurance as a wanted benefit versus 67% of Generation X and Boomers.

Employees were also asked what benefits they want but don't have. Consider that almost two-thirds (65%) of employees want bonuses, but only 33% currently receive them. Generational data shows the scope of the issue with spot bonuses:

- Generation Z, 19% have, 42% want
- Millennials, 13% have, 51% want
- Generation X, 9% have, 54% want
- Baby Boomers, 7% have, 54% want

And survey respondents offered insight on the benefits they have versus the benefits they actually use. The top underutilized benefits are life insurance, vision, paid bereavement, disability and paid maternity leave.

This raises an important question. Employers should look to see what benefits are offered and what their utilization rates are, and ask themselves whether it's worth the cost to continue offering certain benefits if they're not being taken advantage of.

Or they should ask themselves if they need to start efforts to increase awareness about the benefits offered, with the aim of ultimately increasing employee utilization to get the desired retention

impact from offering them.

When it comes to company size, it's not surprising there are differences in the benefits offered to employees. In general, the larger the company the more likely it is to offer health insurance (PPO, HMO, etc.). Consider the following breakouts of company sizes offering health insurance:

Larger companies are also more likely to offer incentive bonuses:

- 12% of companies with 1 to 9 employees offer an incentive bonus
- 15% of companies with 10 to 19 employees offer an incentive bonus
- 20% of companies with 250 to 499 employees offer an incentive bonus
- 23% of companies with 500+ employees offer an incentive bonus

So, what does this mean for employee benefits professionals? Healthcare remains a highly coveted benefit by most employees and job seekers. But there are also other less-traditional benefits that are worth exploring to attract and retain employees. For example, 25% of Generation Z employees say that student loan repayment assistance would influence their decision to accept a position at a new company

And money talks—bonuses are important to employees so employers may want to consider adding sign-on and spot bonuses to their benefits mix. ■

Chris D'Ambrosio is Senior Vice President and General Manager for ADP Insurance Services. This article first appeared on the ADP Spark blog <https://www.adp.com/spark>.

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What to Know When Your Clients Want to Expand Their Businesses to Another State *By Nellie Akalp*

ARE YOUR CLIENTS looking to expand their businesses to another state? If so, that's a great indication of success and they'll probably turn to you for financial guidance to help them. However, they may also need advice on how to legally operate in the new state different. Here's what you need to know.

WHEN TO REGISTER

Foreign qualification is the process of registering a business in another state in order to conduct business. Whether or not the client needs to register depends on a number of factors, and unfortunately most states won't specify exactly which activities constitute doing business. In general:

- Will your clients have a physical presence (office space, warehouse or retail store) in the state?
- Will your clients conduct in-person meetings with clients or customers in the state?
- Is the business structured as limited liability company (LLC), corporation or limited partnership (LP)?
- Will the business have any employees living/working in the state?

If the answer to any of these questions is yes, your clients need to file a foreign qualification in the states in which they intend to conduct business.

WHEN NOT TO REGISTER

Not all business activities require foreign qualification. For example, if your clients are freelancers or consultants and most of their work is conducted online, they do not need to file a foreign qualification. E-commerce businesses are different because there are sales of products involved and often a warehouse with products located in the state.

In most states, the following business activities also don't constitute transacting business in a state:

- Defending or settling a lawsuit
- Dealing with internal LLC or corporate business such as member meetings
- Having a bank account in the state
- Selling through independent contractors
- Securing or collecting debts
- Conducting an isolated transaction that is completed within 180 days and not repeated

HOW TO REGISTER

Most states have similar procedures to file a foreign qualification and it starts at the Secretary of State's office in the state in which you want to register.

Your clients need to submit a Certificate of Authority application and pay the fees. The client may also have to show the business is in good standing in its home state, which may require documentation.

Next, conduct a name search in each state to make sure the business name is legally available. If it is not, the client will need to use a "fictitious name" (or Doing Business As/DBA) in that state.

Once your client has foreign qualification, will a registered agent need to be appointed? A registered agent (also known as statutory agent or resident agent) is a person or entity with the authority to accept service of process (legal documents and notices) on behalf of a business. A registered agent can handle in-state responsibilities such as:

- Official federal and state correspondence
- Subpoenas for information
- Tax notices from the IRS and local tax authorities
- Lawsuits
- Summonses to appear in court
- Corporate filing notifications

To find a registered agent, check the website of the state to which you're expanding. Many list registered agent services in their state.

THE RISKS OF NOT FILING FOR FOREIGN QUALIFICATION

Failing to foreign qualify when it's required can cause significant issues for a business, including being penalized for operating illegally.

Some of the penalties include:

- Fines and interest for the time the company was conducting business in the state and was not foreign qualified
- Payment for missing filing fees.
- Payment of back taxes.
- Ineligibility to sue in the state, because an entity can't bring suit in a state where it isn't registered.

HIRING OUT-OF-STATE EMPLOYEES

California's new AB5 law has made it harder to classify workers as independent contractors and other

states may follow. Consequently, your clients may find they need to hire out-of-state employees—and that means paying employer taxes in other states.

Your clients will need to register with the employee's state tax agency, obtain a state income tax withholding number (and unemployment insurance number) and withhold income taxes for that state. If the employee lives in one of the states without a state income tax (AK, FL, NV, NH, SD, TN, TX, WA, WY), your client will still need to pay the federal income tax.

The business will also need to be registered with that state's labor department and be compliant with rules for employees in the state including minimum wage, labor laws, disability insurance, worker's compensation and more. Have your clients contact their payroll provider when they are ready to hire out-of-state as these companies are familiar with handling multi-state workforces and know the regulations in each state.

COLLECTING SALES TAX

Whether or not you have a physical presence such as a warehouse in another state, having an out-of-state employee signifies enough presence so that you need to collect and pay sales tax in that state. Having "nexus" in a state means having a connection and when it comes to having sales tax nexus in a state, the law considers whether the business has a physical location in the state, resident employees in the state, property (including intangible property) or regular sales people. In addition, in 2018 the Supreme Court determined states can now base sales tax collection requirements on economic activity alone (dollar amount or number of transactions).

Once your client has determined there is sales tax nexus in a particular state, the client will be required to collect sales tax for all taxable transactions from that state and will pay sales tax to the state's department of revenue. Sales tax return forms declaring all transactions will also need to be filed. ■

Nellie Akalp is a passionate entrepreneur and business expert. She is the CEO of CorpNet.com, a resource and service provider for business incorporation, LLC filings, and corporate compliance services in all 50 states.

The Continuous Improvement Approach to Leading Change

JONATHAN MACDONALD, A noted author and expert on change management, once said, “Change is the only certainty. Today is the slowest rate of change we will ever experience. And those who are most adaptive to change stand the greatest chance of survival.”

The accounting world is changing dramatically - so much so that change has become “business as usual” in many firms, and success depends on how firm leaders manage and execute change. So how are you approaching the changes happening in your firm? If you feel like you could be doing better, consider taking a continuous improvement approach.

Continuous improvement is the ongoing effort to improve products, services or processes. Simply put, it means getting better all the time. As it pertains to change leadership, there are four overarching areas in which it applies.

ALIGNMENT

Having helped many firms with change management strategies, I recognize that firm leaders must have clarity and get in alignment with their responses to the following questions:

- What is your firm's strategy for change? It's difficult to manage change and hold people accountable without a strategic plan based on a shared vision. To lead change, firm leaders must spend time strategizing ways to position the firm for increased potential and growth. Annual strategic planning sessions and accountability reviews can help firm leaders get in alignment and accomplish positive change.
- Who is leading change in your firm? Every firm needs a change leader whose job it is to pave the way for others to buy in. A change leader needs to actively interact with the team, communicating early and often. To be effective, that communication needs to provide an understanding of what is changing, take into account the human

response to change, and help convince people that the work is “worth it.”

- Have you included the Voice of the Client in your strategic plan? Everything you do should start with a consideration of what clients want, think, expect and value. If you aren't listening to that voice, you risk missing the mark in your strategy, and missing opportunities to improve work product and service delivery – both of which must be continuously improved to be competitive in a crowded marketplace.

AWARENESS

With the profession experiencing significant change, you need to effectively lead people through difficult times. To do so, you need to have an awareness of how people react to change.

- How is change impacting the firm's talent? The future will look different – from how the organization is structured to the components that make up the technology and talent workforce. New technologies and automation are impacting the work being done, the workforce being used, and where the work gets done. Talent is no longer just your full- and part-time employees. It includes technology and independent contractors as well.
- How are you addressing the emotional side of change? One challenge for firm leaders is that everyone reacts differently. Some get hung up on the past, others approach with hesitation, while others embrace change and get excited about the prospect of a positive future. Think about how each member of your team may react to current and future changes. Sometimes, effective change management requires leading one person at a time.

- Do you expect 100% buy-in? Every firm wants to get their people on board and excited about the future, but assuming that everyone will get there at the same time is unreasonable. If you're waiting for 100% buy-in to make necessary changes in your firm, you're setting yourself up for failure. The reality is, you need to move forward. Hopefully, the hold-outs will see that the change benefited the firm and get on board.

ACCOUNTABILITY

Holding others accountable is how leaders reinforce and communicate how much a goal matters and how much the people who will meet the goal matter.

- How are you measuring and tracking success? Measuring performance is one of the most clear and universal ways to hold people accountable. Every goal in your plan should have a measurable result that allows you to track your progress. Revenue and profits are a given, but you may also track other metrics, such as leads generated from marketing, the number of hours spent meeting with clients outside of normal deadlines, etc. You'll have to decide what makes the most sense given the goals you've established.
- Are success metrics visible and transparent? All of the work you put into measuring and tracking activity is meaningless unless the people involved know the numbers. Share them with your team to help drive focus.
- Are you leveraging peers and outside resources? Keeping pace with change can be difficult, especially if you're not looking outside of your organization for new ideas and best practices. Joining a peer community can push you beyond



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your current limits and ensure you are on the right path.

ACKNOWLEDGMENT

Engaging everyone in the process of change requires acknowledging the value of each contributor within the organization.

- Are you gathering and sharing feedback effectively? All change practitioners know how important communication is to any initiative, but it must be a two-way street. People become disconnected or misunderstand what's going on if they're just blasted with updates. Turn communication into a loop by developing a feedback system. Listen to how people are feeling and look for ways to improve communication to keep change moving along.
- Are you acknowledging and celebrating successes? It's essential for teams and individuals working on complex initiatives to achieve small wins regularly. Setbacks are common when working through big problems, and people can become disheartened unless they can point to some achievements, even if that achievement is minor. Acknowledging and celebrating successes, no matter how small, gives an emotional uplift and helps build faith in the effort.
- Are you leading with courage? It takes courage to leave behind what is familiar, move forward with something new and push through the learning curve. Courage is the deciding factor. Get help from other successful firms and enlist the help of outside facilitators. If you feel like you don't need courage, your goals aren't big enough! ■

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