



**3 STEPS TO ENSURE SUCCESS WITH
REMOTE WORKFLOWS, TECHNOLOGIES
AND PROCESSES**



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INTRODUCTION

For the accounting profession, 2020 accelerated many trends that were already underway. The most obvious example, of course, was remote work.

According to a Brookings report, up to half of American workers were working from home in April of 2020. That's more than double the fraction who worked from home (at least occasionally) in 2017/2018.

But will the trend continue once the pandemic is over? Most experts believe it will. In fact, Global Workplace Analytics predicts that 25-30% of the workforce will work from home multiple days a week by the end of 2021.

However, this trend has highlighted the "haves and have nots" in terms of technology investments. For some firms, investments in technology enabled a seamless transition to remote work. While working from home, employees send and receive information from clients through secure portals as they moved through audits, prepared tax returns and delivered consulting and advisory engagements.

In other firms, the transition wasn't quite as easy. Many of these firms relied on on-premises technology and collecting client documents in person or via mail. Even if they could collect client documents electronically, they struggled with getting them into a consistent format.

While some firm leaders may have thought the switch to remote work would be somewhat temporary, we now know these changes are likely to be permanent – at least to some extent. For that reason, it's important to implement new workflows, technologies and processes that will support this new way of working.

In this white paper, we're highlighting three steps to ensure success in adopting these elements.



THE SUCCESSFUL REMOTE OFFICE

There are many benefits to running a remote firm, whether or not you maintain a brick-and-mortar location. Not only can a firm save money on rent and utilities, but employees save time by getting rid of commutes and you can hire people anywhere in the world, which lets you choose the best talent available.

However, you can't just hand everyone a laptop and expect your remote firm to run like clockwork. A successful virtual firm requires the right tools and processes to make remote work successful. Here are a few elements to consider.

■ TECHNOLOGY

Your remote team members must be able to access all of the important files and documents they need to complete their work efficiently in a virtual setting. They also need to be able to communicate with colleagues and clients seamlessly.

Some of the tools required in a remote office include:

- **Video conferencing software** to hold team meetings, client calls, webinars and remote interviews
- **Project management/workflow tools** that allow you to assign specific tasks with due dates, move work between team members and track the status of engagements
- **A password manager** to encrypt and store important login information online
- **Secure client portals** to allow clients to send and receive information digitally

■ PROCESSES

One of the biggest challenges in a remote firm is communication with other team members. In addition to communication technology like email, instant messaging and video conferencing, you need a process for when to use each tool. Establish guidelines for when your team schedules a meeting on Zoom or Microsoft Teams, when you use email, and when instant messaging is the right means of communication.

Another crucial aspect of a successful remote firm is having a process for transferring knowledge. In most firms, training initiatives involve getting a bunch of people in one room. When that's not possible, how do you share knowledge? Your knowledge transfer processes need to include formal training and social learning – the knowledge that comes from informal interactions with coworkers.

While the specific processes for completing client work will differ from firm to firm, the processes in a remote firm should ensure that your clients experience the same service level when your team works virtually as they would if your entire staff were in the office.

Your processes should consider:

- How clients get their tax documents, audit PBC items and other information to you
- How clients sign tax returns and engagement letters
- How they meet with you

The more paper is involved in these processes, the slower your firm will turn around work and the more difficult it will be for clients to work with you.

■ PEOPLE

For your remote firm to be a success, you need your virtual team to be successful, too. The first step is to hire the right people.

For a remote firm, the pool of candidates you have to choose from is large. You can hire someone in any state or country, but they need to be the right person for the job. One of the most important qualities of a remote employee is that they are self-motivated. A smart person can learn new skills, but someone without self-motivation won't be able to work remotely without constant supervision.

Next, we'll discuss how to ensure successful remote work in your firm.



STEP 1: BUILD THE RIGHT TEAM

For some firms, 2020 required a heavy investment in hardware and software. In the best of times, a project like this would be monumental in scope. But add to it other elements of the pandemic, such as anxiety, closed schools and daycares, and health concerns, and the project can be downright daunting.

To improve such a large-scale initiative's success, your firm may need to pull new personalities into your technology planning teams.

- **The Champion.** For any firm-wide project to succeed, you need a Champion. This person has political capital throughout the firm, is persuasive in meetings, and encourages forward motion despite opposition or roadblocks. Your Champion should have a high enough position in the firm to drive adoption and interest, as well as understand the business case for the project. Their role is to provide resources and eliminate barriers to success. This may be a partner if they have a commitment to the project and communication skills. If not, find another Champion who understands why the firm needs to support remote work, automation and streamlined processes long term and get them on board.
- **The Team Lead.** Your Team Lead drives execution of the initiative by ensuring that things get done. This person is a team builder with project management skills and a high level of responsibility and accountability. The Team Lead needs to be passionate about your initiative in order to meet and overcome challenges.
- **The Cross-Functional Team.** Your team will come from every area of the firm that will be affected by the changes you are implementing. They understand the needs and frustrations of their coworkers and actually know how to get the work done. For these purposes, at least one member of the team will need to come from your IT department, but they may also come from Administration, Assurance, Tax, CAS,

With these personalities in place, implementing new workflows, technologies and processes for your remote team will go much more smoothly.



STEP 2: STANDARDIZE PROCESSES

Another truth that the pandemic shined a light on is a lack of truly standardized, digital processes in firms.

Without standardized processes, work can easily fall through the cracks. You can compensate for those shortcomings to some degree when everyone is in the office because people can talk in person and look over each other's shoulders. In a remote team, however, people tend to develop their own processes and procedures that don't mesh with the way other people work. This leads to inefficiency, errors, and frustration among team members who must learn a variety of ways to complete the same task due to the personal preferences of each partner.

Whether your team is working in the office or working from home, it's crucial to have a documented, standardized way of working that everyone follows.

Trying to automate aspects of those processes will also reveal inconsistencies and places where each partner has their own process for getting work done. Automation reinforces standardization because you cannot automate inconsistent processes. To automate, you must decide on a standard and formalize the steps required. This builds consistency and quality into your operations and creates further efficiencies.

Standardized, automated processes shouldn't just cover client-facing aspects of your firms, but the back-office functions as well.



STEP 3: BREAK THE 'HOURS X DOLLARS' TRAP

One of the arguments we hear against automation technology and streamlined processes is that firms will necessarily have to bill less if their engagements take less time. Let's be clear: Improving efficiency in your firm should not result in reduced billings. Improving efficiency doesn't make the work any less valuable to the client, and you need to recoup that investment in technology.

Also consider what else your firm can do with the time saved by automation and process improvement. Additional capacity provides an opportunity to develop other capabilities that will help your firm expand its advisory and consulting service capabilities.

If your firm processes tax returns faster so you can work on more and tax returns each year, you're taking a short-term view. Doing more of the same might boost your bottom line in the short term, but it's not a strategy for long-term relevance and success.

The real opportunity is in elevating your thoughts beyond efficiency so you can increase your capacity to transform while you perform and add higher-level, advisory and consulting services to your firm's business model.



HOW GRUNTWORX SUPPORTS ON-SITE AND VIRTUAL

Few firms right now have the time or inclination to rip out and replace all of their technology in order to better support remote teams. Fortunately, such drastic measures aren't necessary.

GruntWorx is a scan-and-fill technology that streamlines 1040 tax return preparation, whether you need help organizing client documents or keying returns. Best of all, your team can use GruntWorx from anywhere with internet access. Just scan and send client tax documents, and your files are ready to be worked on in 24 to 48 hours.

- **Organize LITE and Organize.** Organize LITE and Organize reduce paper clutter and standardize workflow by producing a searchable PDF that is bookmarked in the same order every time. Organize takes the LITE version a step further by ensuring every PDF is verified for accuracy by their US-based human validation specialists.
- **Populate.** Populate reduces manual data entry by accurately extracting data from scanned client documents to import into the firm's tax preparation software – helping the firm complete more returns in less time.
- **Trades.** Trades shortens 8949 preparation time by creating an import-ready Excel file from scanned consolidated brokerage statements and Forms 1099B. This allows the firm to focus more on advising clients with complex tax situations.

Using a simple, streamlined approach, GruntWorx doesn't replace your existing tax technology. Instead, it integrates into your current processes and software. It's a plug-and-play solution that will help automate and streamline your processes, saving hours that would otherwise be spent on some of the most tedious aspects of tax preparation.



CONCLUSION

Remote work is here to stay, so whether your team is back in the office or working from home for the foreseeable future, you need cloud-based tools that can help them work efficiently from anywhere.

Completely ripping out and replacing your entire technology stack isn't always the best course of action. That requires a significant amount of money and time that few firms have right now. No less costly is the training that would be required by such drastic measures.

Start by looking at ways to leverage your existing technology better and make it more remote ready while minimizing disruption. A lower-cost solution can often deliver incredible improvements to your workflow and significantly impact productivity and profitability.

ABOUT THE AUTHOR

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Jim Boomer is CEO of Boomer Consulting, Inc. and an expert on managing technology within an accounting firm. Accounting Today called him a “thought leader who can help accountants create next-generation firms.” He acts as a strategic planning and technology consultant to CPA firms across the country. Jim is a prolific writer and has been published in several print and online publications include The CPA Practice Advisor, Accounting Today, Accounting Web, the International Group of Accounting Firms and several state society publications. His ability to turn abstract ideas into reliable solutions has earned him a place in Accounting Today’s Top 100 Most Influential People in Accounting for six years running.

Boomer Consulting, Inc.

Boomer Consulting, Inc. provides communities, consulting and training to hundreds of the highest performing CPA firms. Our unique and powerful solutions target five areas critical to a firm’s success: Leadership, Talent, Technology, Process and Growth.

GruntWorx

GruntWorx, LLC, is a leader in cloud-based paperless tax workflow systems. GruntWorx provides a comprehensive and integrated family of web-based products that automate client tax document organization, data entry, and review. To sign up for a demo, visit GruntWorx.com.

ⁱ Guyot, Katherine and Sawhill, Isabel V. “Telecommuting Will Likely Continue Long After the Pandemic.” (April 6, 2020, accessed at <https://www.brookings.edu/blog/up-front/2020/04/06/telecommuting-will-likely-continue-long-after-the-pandemic/>)

ⁱⁱ Global Workplace Analytics. “Work-At-Home After Covid-19 – Our Forecast.” Accessed October 6, 2020 at <https://globalworkplaceanalytics.com/work-at-home-after-covid-19-our-forecast>



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