

# How Workflow Technology Can Transform Your Accounting Practice

Best Practices On Utilizing Automated Workflow,  
Including Examples For Individual Tax Engagements



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**About XCM Solutions, LLC:**

Founded in 2004 by CPAs, XCM Solutions, LLC provides accounting firms with web-based workflow automation solutions that increase efficiency, productivity and profitability. The company's management team has drawn on its extensive experience in public accounting and clear understanding of the paper-driven workflow issues facing the profession to develop technology that addresses those challenges.

XCM's customer-guided development process has helped the company continuously raise the bar for business process automation solutions for the accounting profession. The award-winning XCM™ workflow and information automation software has become a key piece of the technology equation for firms re-engineering paper-based processes as they move toward a paperless environment.

"XCM was designed by CPAs to solve a real challenge we faced in our firm. We learned by our own experience that we could realize radical productivity gains by standardizing and automating how we work. In XCM, we have developed a powerful tool that draws on our knowledge and the collective knowledge of our clients to empower all firms to attain the same success." – Mark Albrecht, CPA, MST, Chief Executive Officer, XCM Solutions, LLC

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# INTRODUCTION

Gone are the days of audit trunks and tax binders. The rise of the digital age with mobility at its core is driving the need to work faster and smarter. This trend is especially prevalent in the accounting profession, where the acceleration of technology, combined with longer busy seasons compressed due dates and staff retention challenges create a perfect storm of chaos that firms must learn to navigate in order to thrive. Companies must find a way to adapt to this changing environment by leveraging technology to drive process improvements.

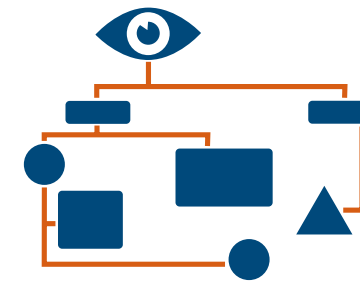
Workflow management software is designed to help firms through this change, with a focus on working more efficiently and productively, while facilitating the transition to a paperless work environment.

Workflow management systems help firms manage all work processes, department-wide and across multiple offices, consolidating disparate tools, spreadsheets and databases, ultimately centralizing client data, which results in increased efficiency and improved client service.

This article focuses on best practices of workflow, and includes individual tax return examples:

- Workflow Management Overview
- The Evaluation Process
- Building an Implementation Plan — A How to Guide, including Best Practices for Today and Tomorrow
- Ongoing Improvement

# WORKFLOW OVERVIEW

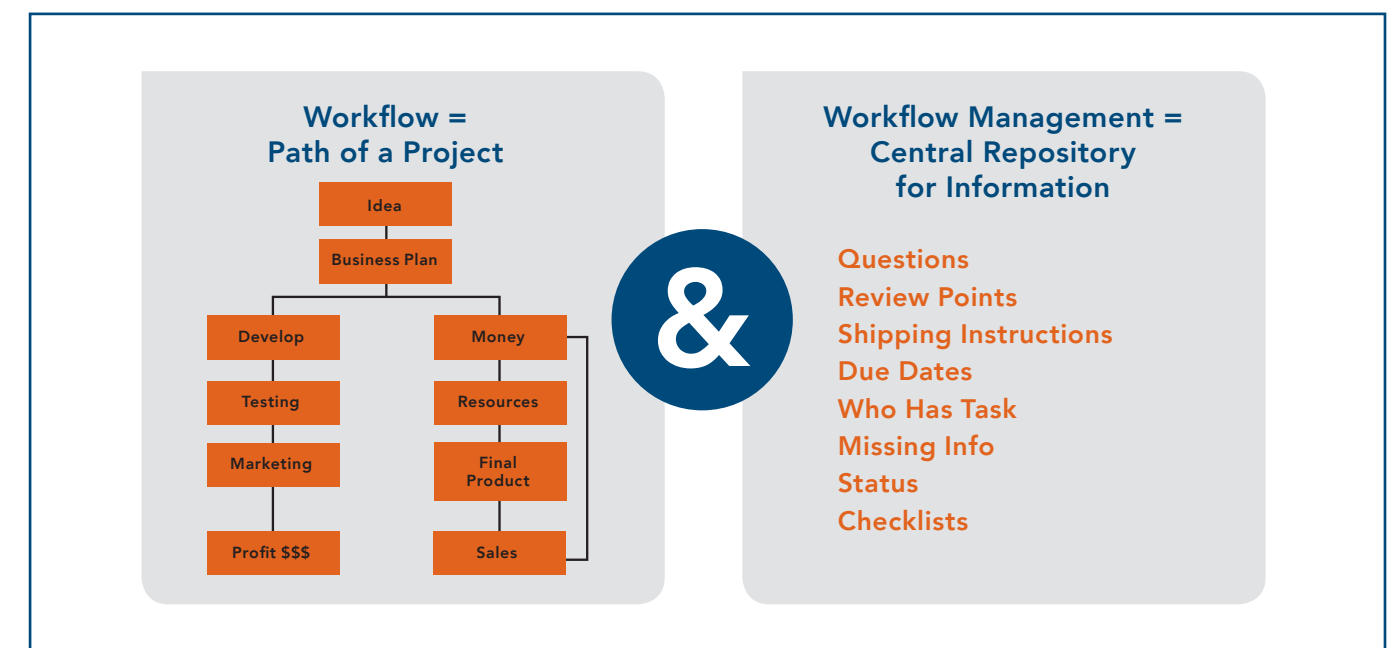


In a digital environment, workflow management systems allow firms to standardize process for different types of deliverables and route work through an automated system until completion.

## So What is Workflow?

Workflow can be seen as both the path of a project as well as a tool for capturing unstructured data collected throughout a project's lifecycle. In a paper environment, tax returns or audit work papers are archived in file rooms and moved from person to person through the lifecycle of the project. In a digital environment, workflow management systems allow firms to standardize process for different types of deliverables and route work through an automated system until completion. For example, "tasks," such as tax returns, audits and client accounting engagements, will be routed automatically through the office in a pre-determined order to a designated person. At each step, the designated recipient will be notified to complete various steps associated with the "status" of the task. During that process, various pieces of information will be collected and retained with the task. This process can replace what exists in a paper environment, while creating efficiencies and minimizing redundancies along the way.

Figure 2.1 Example of the Workflow Management Concept



Continued on Page 4

## Why Workflow?

In addition to the challenges inherent in not having a consistent, standardized digital work process, without automation, a paper or paperless environment lacks an efficient means of gathering and storing information essential to work management and client service:

- ▶ **Data Collection and Reporting** — Many hours are spent gathering information from multiple sources and creating a consolidated view. Often, the consolidated information is stale and outdated as soon as it is distributed.
- ▶ **Disjointed Information** — In situations where client files are carried through the office or information is retained in multiple sources, data points such as review notes and client communications can be spread across emails, Post-It notes and voicemails, which become disjointed and difficult to follow. In addition, this creates redundancies where a subsequent reviewer may ask the same question because they lacked transparency into what was previously addressed.
- ▶ **Lack of Continuity** — The disjointed information impacts the carryover of information and prevents clear continuity year over year. Continuity is critical to delivering quality client service, which can suffer in years when turnover occurs.

A workflow management system is an automated tool that virtually eliminates the need to manually move files throughout your office, providing instant access to client information and deadlines, and reducing anxiety and stress during the busy season at all professional and administrative staff levels. The availability of information on-demand allows users and firms to have instant access to the status of their clients, instead of having to track down each person via email, phone or in person to find out the status of a tax return or audit. By having this information available at your fingertips, firms can spend more time on data analysis rather than data collection, which ultimately increases productivity. Increased productivity enables firms to assume incremental workload which results in increased profitability or the ability to focus on more strategic imperatives.

When determining whether to invest in a new technology solution, specifically technology that intends to optimize standardization and create efficiency through process consolidation and best practices, it is important to analyze how the technology benefits outweigh the costs. Consider validating the benefits you think the technology will provide by reviewing information provided by peers in your professional network that currently utilize the same technologies. For example, the chart below (provided from XCM Solutions LLC annual workflow survey) reports time savings by firm size where member firms self-reported on items such as “searching for the status of returns and who has them,” “posting “responding and accessing questions and review points, compiling reports for due dates, extensions, and workload,” “documenting and supplying assembly and shipping specific information,” to topics such as “managing client inquiries and avoiding time drains specific to when and how access to information impacts direct communication.”

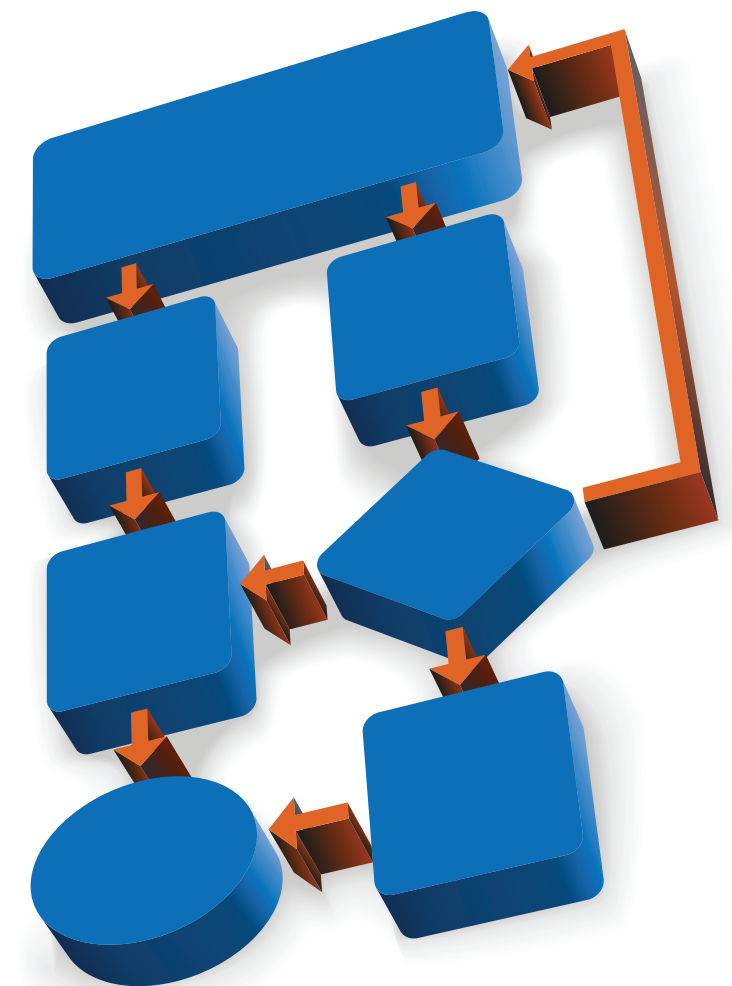
Range Firm Size	User Time Savings (Minutes Per Day)
001-004 Employees	41.77
005-009 Employees	41.30
010-019 Employees	54.84
020-049 Employees	60.08
050-099 Employees	85.01
100-249 Employees	80.61
250-500 Employees	90.57
500-999 Employees	69.00
<b>Average Savings</b>	<b>72.05</b>

TAX DEPARTMENT USERS	
Firm Position/Level	User Time Savings (Minutes Per Day)
Manager, Senior	67.17
Manager, Director	67.17
Partner, Principal, Vice President	67.76
Senior, Staff, Associate	71.80
Administration	77.17
<b>Average Savings</b>	<b>72.05</b>

Workflow gives you greater control over your work and the freedom to work collaboratively from anywhere. By establishing a system to govern how work moves within your office and between resources, you gain the ability to control essential elements of your business process such as:

- ▶ Allowing you to secure remote access via the Web from anywhere at any time, giving you the freedom to strike a better work-life balance.
- ▶ Providing full due date monitoring and tracking capabilities, with real-time reporting in a single system, including dynamic, real-time personal “to do” list that empowers you to better manage your day and overall workload.
- ▶ Automating workflow to ensure compliance with standardized best practices, by capturing status details and process history.
- ▶ Managing client information and project knowledge in a central location to enable responsive client service, and ultimately adding more value to your practice.
- ▶ Empowering a completely paperless workflow that when established correctly, can integrate with your existing document management system or Windows® Explorer filing system to reap the benefits of a paperless office and maximize the return on investment in technology.
- ▶ Controlling and standardizing the processes across the firm while improving staff efficiencies and collaboration

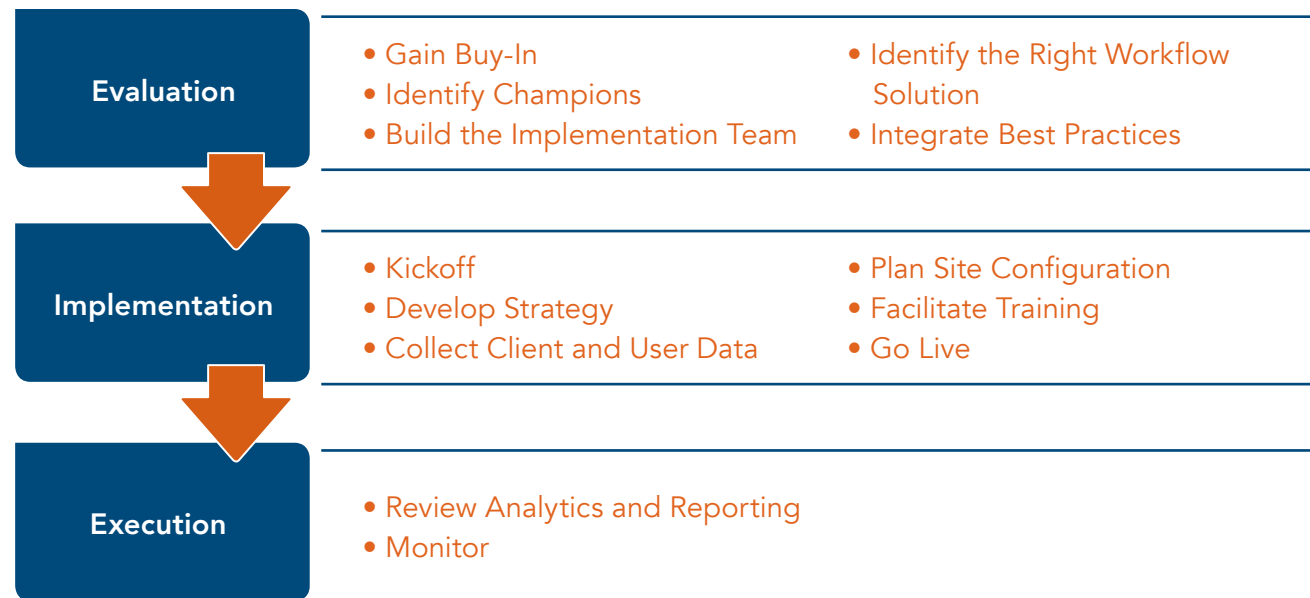


# IMPLEMENTATION ROADMAP



Identifying the need for a workflow management system is just the first step, but the idea can only be successful, if acted on. Like any large scale initiative that impacts multiple departments and levels, building a proper project plan is the foundation for long term success.

The illustration below is a roadmap for firms to follow when considering implementing a workflow management system:



The Implementation Roadmap illustrates the best practices for firms to leverage through the full lifecycle of the project implementation from evaluation through execution to ensure a smooth transition.

This roadmap is scalable depending on the size of your firm and the number of departments considering the workflow solution. Firms with 10 or fewer people may be able to execute each step quickly and easily since a team of 4–5 often is working side by side on a daily basis. Conversely, larger, multi-location firms looking to implement a workflow solution across departments may need to be more deliberate to ensure each step is considered, especially in the evaluation process.

## Gain Support

The first step toward implementation is to obtain buy in internally. Leverage earlier discussion points from “So What is Workflow?” and “Why Workflow?” to fuel interest in the value of a workflow tool, specifically highlighting the expected outcomes that the firm will receive following implementation. Ideally, these outcomes will tie with the firm’s long-term strategic goals to create interdependency and maximize the impact/return on investment.

## Identify Champions

Large or small, firms should actively engage key leaders early on to share the common vision and to engender the support needed to drive toward implementation. Sentiment at the top will trickle down to the staff and administrative teams, so proactively educating managing partners and senior managers on the value of a workflow tool will mitigate any potential roadblocks and ensure leadership embraces and champions the cause.

## Build an Implementation Team

In addition to engaging senior leadership, engaging team members across departments (audit, tax, corporate accounting services, the administrative team and IT) from the onset will help the various groups understand the expected outcomes, represent their team and be a part of the decision-making process. This elected group will become your core implementation team. The core team will also become the change agents across the firm to influence the decisions being made and to communicate information across all levels in the firm.

## Identify the Right Workflow Solution

While there are many workflow solutions available, there are a handful specifically designed for use in public accounting — each with varying capabilities. Firms will have specific, individualized selection criteria that should be factored into the decision-making process.

The following resources are designed to help firms evaluate the various Workflow Tools in the marketplace:

### ▶ Sample Workflow Questionnaire

The questionnaire on page 8 captures some of the basic requirements to consider when selecting your workflow solution. Firms can use this questionnaire as a guide. Taking the time to review these areas in detail with the implementation team before meeting with your service provider will help you to identify the key components that are important to your process and subsequently identify the functionality you would like to see in the workflow solution. Keeping in mind that the identified solution should enhance or replace your current process during both your initial deployment and when optimizing your systems in future years.

### ▶ Best Practices

In addition, review the following Best Practices section that outlines the process decisions to consider as you are evaluating the features and functionality that different products offer.

Continued on Page 8

Figure 3.1 — Sample Workflow Questionnaire

**Collecting Client Information?**

1. Do you use a routing sheet? If so, what signoffs do you use for individual tax returns?
2. Do you typically get all the client's work papers that are needed to complete the return or do you usually need to contact them for missing info? (yes or no). If yes, would you prefer to track that the return is on hold when waiting for the missing client information, or would you rather move the return to preparation while still waiting for information?
3. Do you scan once the client gets you all of their work papers, or do you scan once the return is completed?

**Preparation and Review**

4. Do you have a specific employee who assigns the returns to the preparers? Do you have a preparation shelf that your preparers go to get returns that are ready to be prepared?
5. Does your preparer usually have questions that need to be answered, by the client or designated person, before they can finish preparing the return?
6. Do you have a specific employee who assigns the returns to the reviewers or do you have a review shelf that your reviewers go to get the returns that are ready to be reviewed?
7. Does your reviewer usually have review points that need to be closed by the preparer before they can finish reviewing the return?

**Workflow and Checklists**

8. Does your 1040 process differ from this white paper best practices set up in ways other than what was addressed above?
9. What other systems do you currently use that capture similar information as addressed above? Do you intend to continue using those same systems to capture data?
10. What is your plan for future integration of workflow processes and will your identified solution scale quickly to provide additional benefit?

**Integrate Best Practices**

Few decision-makers struggle with how to implement a workflow solution, but rather with the implementation content and whether their firm's specific processes conform to industry standards and best practices.

Documenting processes is invaluable and having the option to compare those processes against industry standards can help validate decisions or drive improvements and efficiencies. When evaluating the various workflow solutions in the marketplace, it is critical to validate that the solution aligns with your existing process and allows your firm to maintain consistency while increasing efficiency.

**Key Areas to Consider Include:**

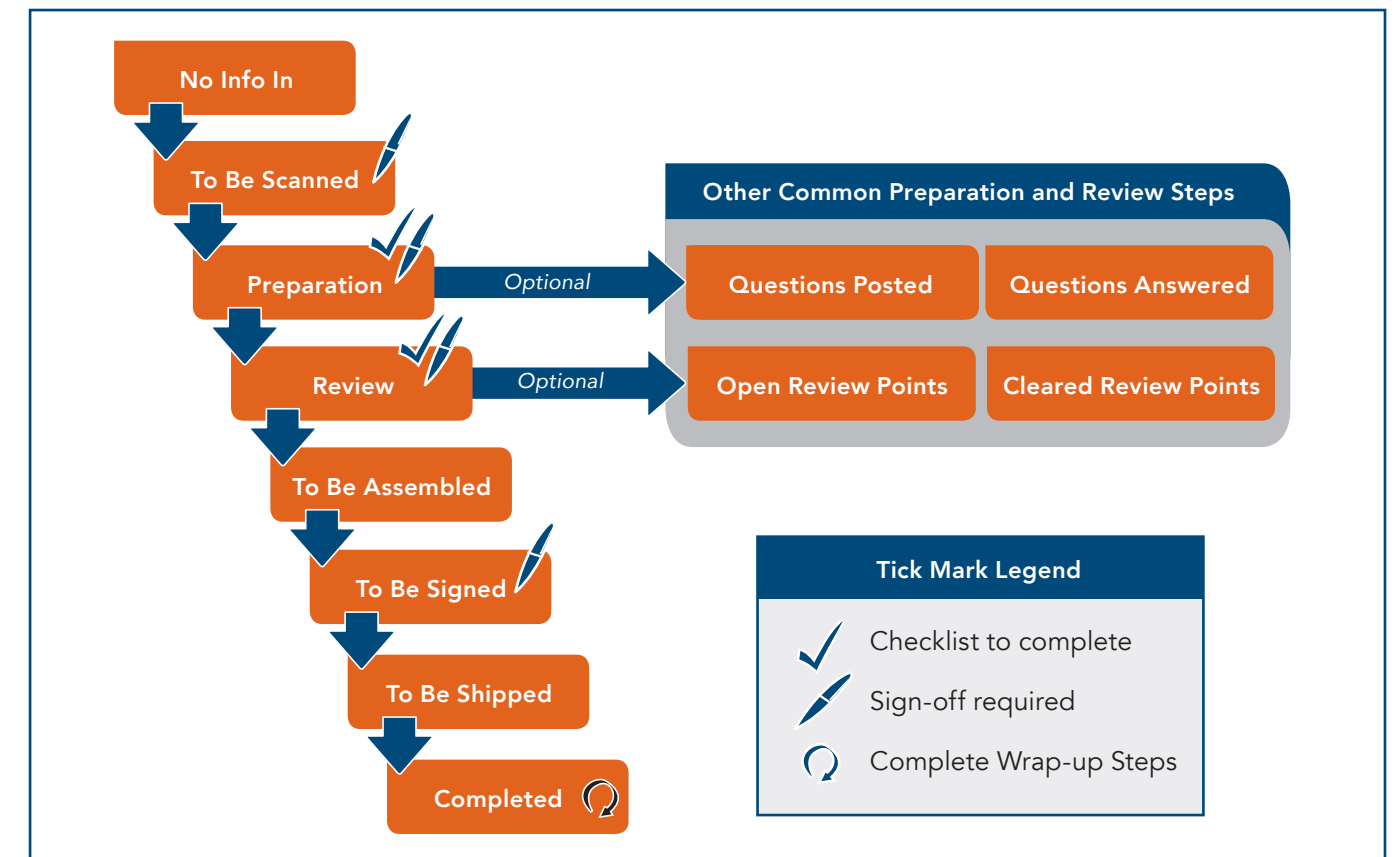
- ▶ Workflow mapping
- ▶ Checklists
- ▶ Signoffs

**Workflow Mapping — 1040 Individual Example**

Workflow Mapping represents the flow of how information moves through the Workflow Solution. This example illustrates a standard 1040 Individual Workflow. Statuses are used to move work throughout the office and the Checklist is used to ensure specific to do items within each status are completed at that point in the process.

Your Workflow Solution should have the flexibility to allow customized mapping, statuses and checklist to reflect your firm's process rather than just a "cookie-cutter" approach.

Figure 4.1 — Sample of 1040 Workflow From XCM Solutions



The details of the mapping above, highlighting the importance of each step in the workflow mapping. Below are the best practices for developing a workflow mapping for a 1040 Individual Tax Return.

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► **Up-Front Scanning**

In the 1040 workflow example, we are building a requirement to scan source documents on the front end of our process. A sound workflow solution will provide a location for capturing the documents required for scanning and indicators for what is or is not currently available. Within this example we are assuming a best case scenario, however, the decision points documented as part of an exercise provided in section 3.1, will help drive what your firm’s Workflow Mapping should look like. This also is where the ability to customize a solution will be important.

► **Preparation Process**

Your workflow solution should accommodate two preparation assignment scenarios: 1) work assigned directly to a preparer 2) unassigned work. For some firms, a scheduling resource is used to identify availability and address work assignments. Your workflow solution should accommodate each scenario by building the core approach to the typical process and providing flexibility to operate outside of that process where necessary. Certain workflow systems will provide first in first out triggers, shared unassigned views, and scheduling specific capabilities. Be sure to evaluate solutions based on your firm’s specific requirements.

During the preparation cycle, you should capture open items, questions and notes that would typically be housed on Post-It notes, physical binders, email activity, and various other forms of communication. Standardizing how your firm captures unstructured data will create consistency and provide instant access to the entire engagement team without the need to request detail or stop progress for the purpose of tracking down information. In addition to capturing open items, the preparer should also be triggered to identify related tasks or entities affecting the tax return (items such as tax notices, related tax returns and research memos). Additional details of essential activities are provided in the section below entitled 1040 Checklist Examples.

► **Review Cycle**

The decisions related to the review process are similar to those made during the preparation cycle. Information related to review points, questions, or relevant documents should be incorporated into your review workflow. Some workflow systems will provide the option to link documents to your workflow, purge data on a routine schedule, or establish sign off controls to ensure that the appropriate people review returns at the appropriate time and when all information for the review is available.

► **Assembly and Delivery**

Many firms maintain their administrative request process through paper routing mechanisms or email communication chains. The workflow process you develop should ensure that these resources receive the information they need at the time the request is made. Your workflow process should include defined responsibility. Preparers should indicate the returns being prepared, the attachments required during assembly, the filing type, and the detailed instructions of how to assemble. The reviewers should confirm that information as accurate and provide additional detail related to how the paper should be shipped, the method for delivery, possible billing implications, and anything specific to the end delivery process.

► **Completion**

Final approvers should be tasked with updating the due date, closing out the workflow process, and acting as the control to ensure that the final completion details are closed out properly. During this time, your final approvers should also establish the following year task requirements. The system you select should have an automatic or manual rollover option that allows you to carry forward pertinent information from this year’s return to next year’s.

**Checklist — Individual 1040 Example**

In addition to workflow mapping, checklists create detailed process control and allow your firm to standardize the specific activities related to the milestone statuses outlined in the above example. A sound workflow solution will provide you with the option to dictate process and to outline important procedures required during those stages. These templates should be available based on the requirements of the type of task or engagement you are tracking. The example below is best practice for an individual tax return checklist.

Figure 4.2 — Sample of 1040 Checklist From XCM Solutions

Checklist Item Description	Associated Workflow Status	Responsible Role
1. Mail organizer/letter	No Info In	Admin
2. Scan source document files and place originals in filing cabinet	To Be Scanned	Admin
3. Attach the following to Routing Sheet — Prior year tax return, source docs, AICPA/Firm checklist	To Be Scanned	Admin
4. Review source documents to ensure all information has been sent and return is ready for prep	Preparation	Tax Manager
5. Review prior year return for issues that might affect this year	Preparation	Tax staff
6. Use XCM Search to locate related tasks/entities affecting this tax return (tax notices, RAR adjustments and research memos)	Preparation	Tax staff
7. Verify Estimated Tax and Extension payments	Preparation	Tax staff
8. If tax projection was done, compare liability/return to actual per return and explain differences.	Preparation	Tax staff
9. Complete the AICPA checklist attached to routing sheet	Preparation	Tax Manager
10. Has client been advised of aggressive tax positions and signed off on them.	Review	Tax Partner
11. If client requires estimated tax payments for upcoming year, create a task for the estimate and set the recurrence for each payment within XCM	Review	Tax Partner

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**Signoff Best Practice — Individual 1040 example**

The last major consideration for your workflow solution is related to signoffs. Signoffs allow firms to add compliance to their workflow process on a per task basis. Users can sign their name and date the stage(s) of the workflow process they completed. Firms have the ability to associate warning or required prompts if the user doesn't sign off on items required at any given stage of the process. Reporting on

sign off requirements are available at the firm, task type, and client task levels. Common methods firms historically use for signoff documentation include:

- ▶ Paper Routing or Control Sheets
- ▶ Excel- or Word -Based Reporting
- ▶ Document Management Systems
- ▶ Engagement Binders

Figure 4.3 — Sample Sign Off Template from XCM Solutions

Sign Off	Prompt	Status Prompt	Responsible Role
Scanned By	Warning	To Be Scanned	Admin
Prepared By	Warning	Preparation	Tax Staff
Reviewed By	Warning	Review	Tax Manager
Signed By	Warning	To Be Signed	Tax Partner
E-Filed By	Warning	To Be E-Filed	Admin

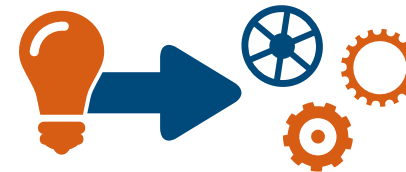
The signoff process is a value add that provides milestone analysis for management reporting and additional controls from a compliance standpoint

**Section Summary: Evaluation Process & Best Practices**

The evaluation process begins with internal collaboration to identify key stakeholders who will serve as project champions. These decision-makers will lead the product evaluation, tapping the key team members who will become the implementation team. This team will help to

identify "What are the expected outcomes from implementing a Workflow Solution?" With this insight, the project champions will then drive the product evaluation, leveraging the best practices to determine "What workflow solution is right for your firm?"

# IMPLEMENTATION APPROACH



Once the workflow solution is selected, the heavy lifting begins. Decision-making, executive buy-in, and proper communication are essential elements of the initial rollout. It is critical to introduce your workflow solution appropriately as often times even the best solutions fall short without the proper firm wide introduction.

Firms should leverage industry experts and rely on vendors to provide consulting and project management services and include

**Project Kick Off**

A proper team introduction and preliminary implementation meeting should be held with the implementation team. Resource availability and expectations should be discussed and documented in a published project plan or general scope statement with the vendor.

**Strategy Development**

Whether you are a single or multi-office firm, a preliminary needs assessment should be conducted to help drive implementation strategy and would document the following:

- ▶ Objectives and requirements of each key stakeholder, including answers to the following questions:
  - Why is a workflow solution needed?
  - What do we expect to be different as a result of this implementation?
  - What is the risk of doing nothing?
- ▶ Implementation approach focuses on who will be impacted by the workflow solution. For example, will the rollout be by office, by targeted service area, or will this be a full firm implementation?
- ▶ Site functionality and usage requirements based on the decisions made during the Evaluation process
- ▶ Develop a project plan with critical milestones including a "Go Live" date

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## Client and User Data

Client and user data will be the initial sources for populating your workflow solution. Collecting these data in a manner that will satisfy requirements of each office or business area will be critical. Subsequently, the implementation team should perform a comprehensive review prior to importing the data to ensure a seamless upload is achieved without any discrepancies.

While the collection and quality of the client and user data will primarily be performed by the implementation team, firms should consider vendors that have experience with the various systems and applications in the market to provide best practices and guidance on how to extract information. In addition, vendors should provide tools and templates that consolidate the data in an easy to use format.

Lastly, if your firm has limited resources or experience with data manipulation, it will be important to consider a vendor that offers data services. Often times this is an additional service fee, but will ease the burden of this step when limitations exist.

## Site Configuration

Your workflow solution should support your existing work process flow which can be optimized through site functionality. The site functionality is determined by the implementation team. Firms should consider assigning one or more power users who are intimately involved with the up front site configuration so they

can continue to tweak the functionality by scheduling periodic reviews and updates to better address evolving business needs. This continuous improvement mindset will deliver far more value than a “set it, and forget it” approach.

In addition to the initial site configuration, a data maintenance process should be developed to ensure efficient coordination of update requirements between office locations or practice areas. For example staffing changes, client additions or deletions, and annual review of data as you prep for each new tax season.

## Training

To help ease the transition into the new workflow solution, firms should adopt a well-developed training program for any employees leveraging the software. Once your site is configured, the goal is for employees, and power users especially, to adopt and embrace the workflow tool. The implementation team should work directly with the vendor to develop a training plan. The training plan would consist of the training delivery (timing, training design, implementation and monitoring).

## Go Live

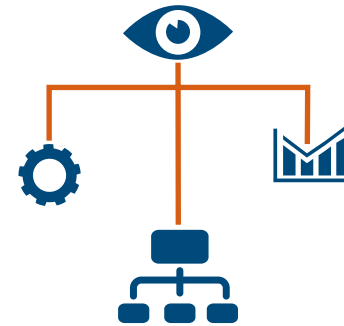
Following “go live” firm should develop a champion team to perform ongoing and continued review of the firm’s process to evaluate change. Each year your champion team should assess the needs of your firm and the capabilities of your workflow solution since a good solution is in a constant state of evolution.

## Section Summary: Implementation Process

The Implementation Process highlights the critical components of a successful implementation including:

- Strategy development
- Client and user data
- Site configuration
- Training

# ANALYTICS AND REPORTING



Beyond continuously evaluating the capabilities, the firm should constantly be assessing the outputs of the workflow tool. While the ongoing process control is essential in any workflow solution; your workflow solution should be more than an internal routing mechanism. The true nature of workflow management encompasses workflow efficiency, workforce management, and management performance. The solution you choose should target these areas and provide you with the appropriate level of control and information for the purpose of making sound business decisions including:

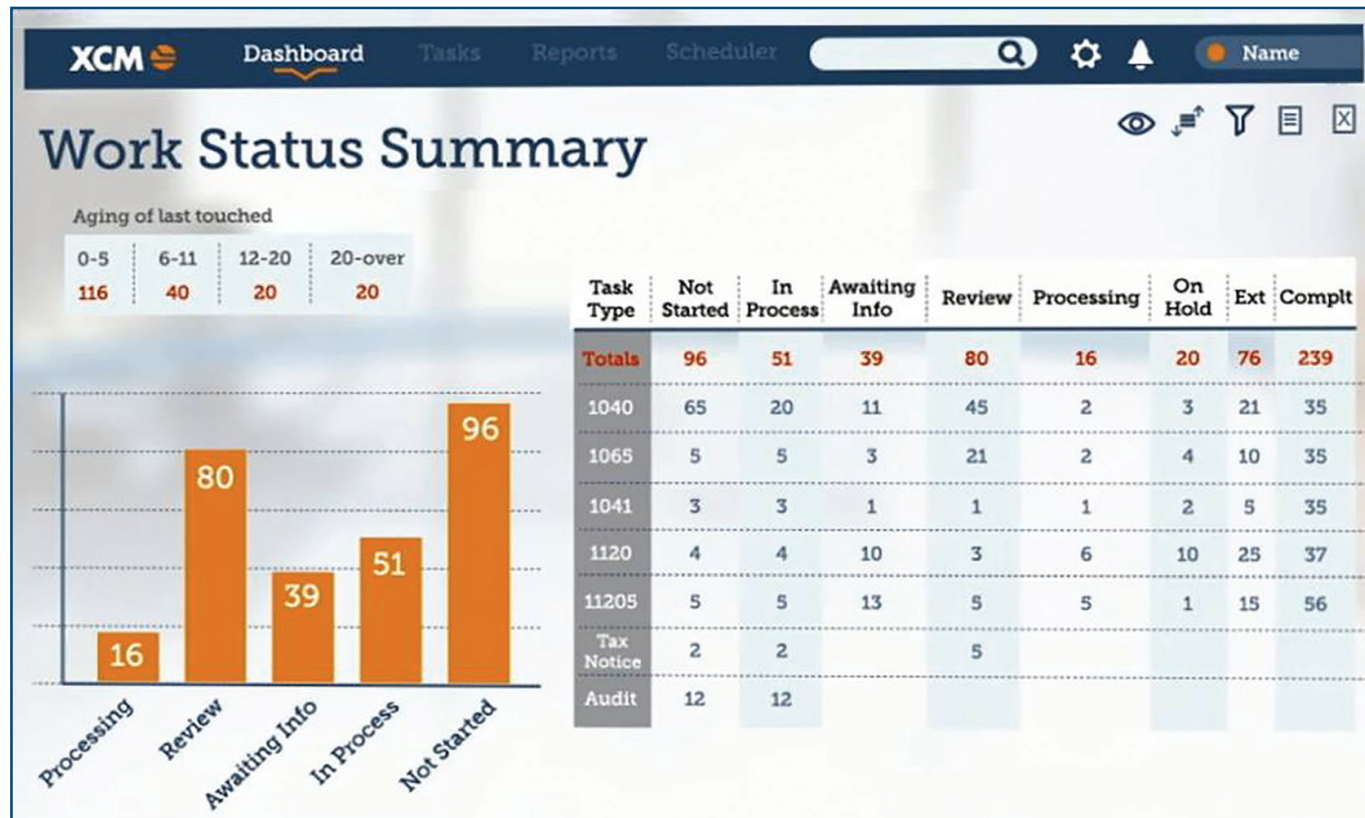
- ▶ **Workflow Efficiency:** Process control, responsibility assignments and routing mechanism
- ▶ **Workforce Management:** Due date monitoring, department oversight, scheduling and forecasting
- ▶ **Management Performance:** Business analytics related to dashboards, benchmarking, and key performance metrics

At a minimum, these data should provide you with on demand due date reports that are easily summarized by client, engagement type, department, practice area or service line, staff level, firm, extended or not extended progress and e-filing status. More robust systems will provide you with access to workload, both work assigned to your staff, as well as a clear picture of unassigned work that’s in process and will eventually be assigned. Whatever the system, reporting and data access are critical components to running your business effectively.

This interactive report provides aging information, status breakdowns by engagement type, and the ability to drill into the numbers to take action directly on the tasks that comprise the total. This style of dashboard reporting ensures access to critical information and the ability to interact with the data from within the reporting mechanism itself.

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Figure 5.1 — Example of a Work Status Summary From the XCM Solutions LLC Workflow Product



As you are evaluating the various workflow tools available in the marketplace and making decisions throughout the implementation process, firms should consider a tool that will translate the key data points in the tool to quantifiable data that will provide metrics to manage the day-to-day workload as well as year over year comparable data. Common metrics and trends to consider are:

- ▶ % Completion at a point in time (year over year)
- ▶ % of returns extended
- ▶ Time to completion
- ▶ Number of returns by level (preparer, supervisor and manager)
- ▶ Total number of returns completed for all employees
- ▶ Cycle times by Status (average number of days outstanding)
- ▶ Acceptance/rejection comparisons

Having key metrics available on demand will ultimately shift the time spent collecting data to analyzing results. Staff and administrative personnel will have the ability to provide real-time updates on the due dates, workload and staffing, while the year-over-year metrics will allow partners and management to dig deeper into key performance indicators that impact forecasting, revenue and business development.

With that said, as your firm is considering workflow, the key is to consider a workflow “solution” verse a tracking “product.” A workflow solution should be a comprehensive tool that includes workflow management, workforce management and firm management. The checklist below outlines the key factors to look for when evaluation the various tools in the marketplace:

Workflow Management	<ul style="list-style-type: none"> <li>• Due date monitoring</li> <li>• Organizes unstructured data, such as review notes, questions, etc.</li> <li>• Promotes standardization using checklists</li> <li>• Customization</li> <li>• Remote access</li> </ul>
Workforce Management	<ul style="list-style-type: none"> <li>• Integrated scheduling features</li> <li>• Resource availability and conflict reports</li> <li>• Integration with an outsource solution</li> </ul>
Firm Management	<ul style="list-style-type: none"> <li>• Metrics and reporting</li> <li>• Dashboards</li> <li>• Year over year analytics (firmwide and industry comparisons)</li> </ul>

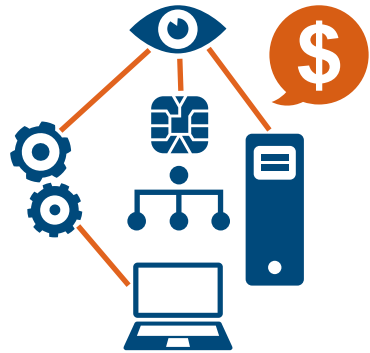
The elements above are the critical features to consider, however the service provider is an equally important factor. With many products available in the marketplace, an industry specific solution will provide firms with knowledge, expertise, support and training to expand on all the product features. Solutions designed by accountants for accountants address the day to day challenges you face, without extensive customization or reconfiguration.

### Section Summary: Analytics and Reporting

While analytics and reporting are one of the main outputs a workflow management system, the decisions firms make during the initial implementation will impact the ability to collect essential data. As firms are evaluating products

in the marketplace, it’s important to consider the end point at the beginning to ensure the workflow solution you use ultimately provides you the metrics you have today and need for tomorrow.

# CONCLUSION: TECHNOLOGY CAN TRANSFORM YOUR ACCOUNTING



Many factors go into implementing the appropriate workflow solution and building the right workflow process. Firms often underestimate the process knowledge and workflow systems already in place. This white paper is intended to provide a blue print for understanding workflow principles, identifying application of those principles within your own firm, and the key elements related to the evaluation, selection, and implementation of a workflow solution at your firm.

While the mechanics are important to get the right outcome, firms also need to remember the why that is driving them down this path. As we stated in the introduction, gone are the days of the audit bag and abacus. Today laptops, smartphones and tablets are making the world work faster and smarter. As a result, firms are being put the test and being forced to not just push more work but to be one step ahead of how to keep the pipeline growing. A workflow management system is key to improving process and effectiveness.

In addition to the pace, the people in this profession continue to change. In late 2014, one of the top four firms announced their intention to increase their 2015 hires by 50%. With growth like that in the profession, turnover will remain a constant concern and resource demands will become more competitive. The infrastructure that firms have in place will become a differentiator to a generation that is attracted to technology and the ability to do more with less.

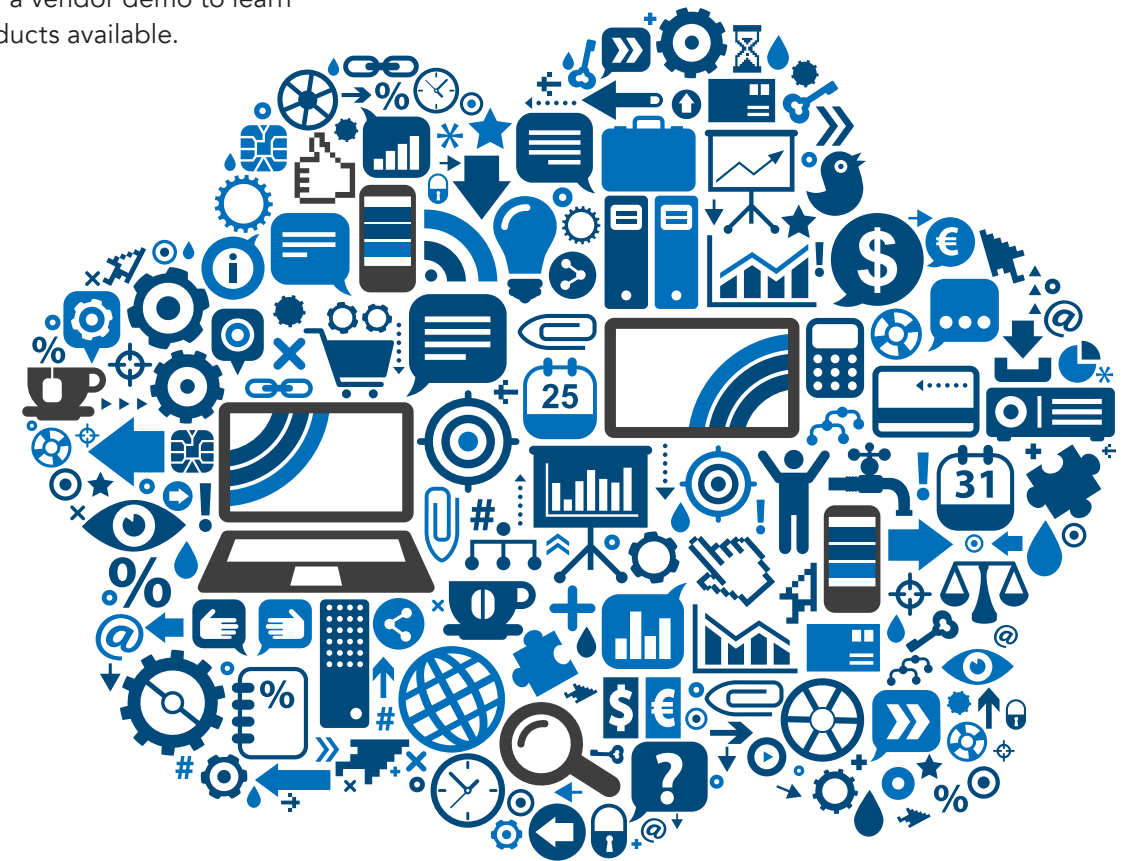
So while you assess the next steps for your firm, use this document as a roadmap to guide you through the key consideration of workflow management and see how integrated tools and technology can transform your practice to give you a streamlined and efficient process, as well as help you stand out as a leading edge practice to the people who make the work a reality.

Remember, implementing a good workflow solution is as much about the product as the process. The AICPA provides you resources like this whitepaper, along with webinars and training that can help you to understand the solutions available

## Additional Resources

For more information consider the following:

- ▶ Sharing this white paper with other members of your team and partner group and host a Lunch & Learn to discuss the benefits of a workflow management system.
- ▶ Listen to PCPS archived [webcasts](#) related to workflow management
- ▶ Visit CPA.com case studies white papers and more.
- ▶ Consider scheduling a vendor demo to learn more about the products available.







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