

A Roadmap to Efficiency

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Most CPA firms and their clients share a primary business objective: to efficiently shorten the transaction cycle, while reducing costs. You can accomplish this objective more easily through the effective use of technology. The following tools, although not a substitute for personal service, can lead you and your clients on the road to efficiency and cost effectiveness.

CONTACT MANAGEMENT SOFTWARE

Contact management software is a versatile, relatively inexpensive, yet valuable, off-the-shelf technology that includes products like Microsoft Outlook, ACT and Goldmine. CMS allows users to build shared information databases, such as company phone books with contacts, addresses, phone numbers and activities. These uses eliminate the expensive practice of individuals creating redundant information systems.

In our office, we also use CMS for scheduling, as a tickler file and paperless filing system. Staff members' activities are scheduled and posted to our CMS. If a client calls with an immediate need, we can quickly determine if a promise can be extended. We also schedule reminders for income tax filings, estimated tax payments or other critical deadlines.

In addition, we record all correspondence, activities and notes through the client contact record, which allows anyone on staff to retrieve e-mails, faxes and letters with a click of the mouse. It's a great tool for one of those urgent surprise client calls, or to bolster a weak memory.

FILE TRANSFERS

Ever have trouble moving a large file over the Internet using e-mail? Are you tired of waiting for information via snail mail, client drop-off or courier deliveries? Our office regularly sends and receives large files such as accounting databases and business plans using a file transfer protocol.

FTP allows more direct, quick transfer of larger files (2.5 megabytes or more) via the Internet using a special key that provides data security. You can get FTP services from your Internet service provider. For the non-technically inclined, a multitude of vendors, such as Xdrive.com provide Web-based FTP services.

DATA FILE BACK UP

A good data backup plan includes offsite data storage. You can accomplish this by using FTP via Internet-based providers like File Monkey (filemonkey.com) or @Backup (atbackup.com) to upload your critical data files to a secured Internet site. It's easy, protects you in case of a disaster, and allows you and your employees to

access files from anywhere with Internet access. For more offsite data storage providers, go to Yahoo and type in "file hosting."

TUNEUPS


Periodic system and process reviews can improve any businesses' operations. In fact, we find at least a 20 percent increase in efficiency after performing a tuneup. Why? Users tend to "bootleg" solutions, which begin to resemble the Winchester House—a rambling series of add-on solutions with no master plan. During a systems tuneup you should review hardware for adequacy of task, accepted processes for usefulness, and reports for utility and lack of redundancy.

Tuneups often result in obvious fixes. For example, if software upgrades are loaded without a thought given to hardware capabilities, as software becomes more complex and resource demanding, your system or application may crash. Usually additional computer memory resolves this frustrating problem and adds some pep to older workstations.

A constant focus on getting things done can leave total task efficiency to a rainy day. However, coordinating efforts between workers and departments can yield substantial savings. This takes patience, as well as technical and people skills. For more information on performing accounting system checkups see: <http://www.calcpa.org/community/newsissues/articles/trg-accsys.html>.

TRAINING

Many companies purchase technology, launch applications or install hardware, but most neglect to provide adequate user training. Complaints about an application's efficiency generally can be traced to an improperly trained user, which can cripple even the best technology. Users need ample training and ongoing support.

A growing supply of Internet-based training products allows self-study at the worker's desk. Learning University, learninguniversity.com, and Corpedia, corpedia.com, offer online lessons for standard office applications and business practices. For specific training, visit any search engine and type in your application name. 



Integrating Technology for
Cost and Time Savings



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