

Making Workflow Work for You

A recent survey noted that workflow was one of accounting firms' top technology challenges. The survey found that 62 percent of responding firms had no workflow software – 38 percent had no workflow software or any intention to implement it, while 24 percent had no workflow software but were considering it. Can workflow be an industry-wide technology challenge if nearly two thirds of the firms surveyed don't embrace it in the first place? Perhaps the gaps in workflow software better explain the "challenge" and firms' perceived failure to adopt automated workflow processes.

What is workflow?

Among the many workflow definitions there is a common basic concept: workflow is the series of activities necessary to accomplish a task. For accounting firms, we can define workflow as moving information, be it a tax return or compliance document, from initialization to completion and getting paid. Technology like email and document-sharing can simplify the movement of information, but that alone doesn't help firms manage due dates, reduce bottlenecks or prevent under- or over-utilization of resources—all aspects of the full workflow picture.

Several software options are currently on the market to help firms manage workflow complexity and turn what is commonly a static checklist of tasks into a more proactive productivity manager. For instance, a manager may instinctively understand what has to get done and by when, but having one source that tracks tasks, staff, due dates, and dependencies is more powerful and will help them achieve optimal firm productivity.

Assigning a task doesn't necessarily mean the employee has time or the dependencies have been completed. Senior staff can't prepare returns until junior staff complete intake: meaning all documents must be scanned, and the engagement letter signed and, when applicable, payment collected. While you know corporate returns are due March 15 and personal returns April 15, you probably don't know if you have enough resources to complete the returns on time. A method is needed to rationalize staff schedules so nobody is inactive waiting for returns and partners aren't overwhelmed by return reviews on April 14.

It's so much more than activities and tasks.

Workflow with integrated scheduling prevents misallocated resources and paperwork bottlenecks. While it won't make busy season less busy, it can make it less frantic. You know from experience that work doesn't flow the way it's supposed to: unexpected events or changed priorities interrupt schedules from managers to admins, activities don't start on time or don't finish when they're supposed to. Integrating scheduling with workflow prevents these delays by giving the scheduler visibility to these factors and options to distribute the work rationally.

Let's take it a step further and talk about optimization. In the real-world, a lot of things don't go exactly as expected. Technology, thankfully, has the power to help automatically identify what was done, what wasn't, how to reschedule it, and to whom. Optimization capability changes schedules and adjusts start

or finish dates at the end of each day, eliminating the need for manual rescheduling. For example, if you schedule a staffer for 20 hours on a return and they need another day, optimization handles the rescheduling and dependent activities without extra effort.

Workflow with integrated scheduling and time tracking provides the following benefits:

- Records ownership. When work is scheduled, you can see the calendar and know immediately where a return is in the lifecycle, who is working on it and when you'll have it for review.
- Due Date management. When workflows and resource schedules use due dates, there should be no unpleasant surprises for you or your clients.
- Improved knowledge base. Workflow with time entry and scheduling provides data for use in subsequent planning cycles. You will know why a return is stuck in intake – there will be ongoing evidence that this client never provides completed documents on time and intake, which you estimated to take four hours, actually takes four days. You'll also know to assign that staffer other returns while they wait.

These benefits equal better client service. If a client requests a status, you can answer the question promptly, because you won't have to track down the right employee – you'll already know who it is. Happy clients means repeat business and referrals, which means increased revenue.

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