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Checklist:
5 Steps to Optimise Tech and Have More Client Time

By Matt Flanagan, Co-Founder of Appacus

There's a world of difference between just signing up to available technology and optimising your use of it. Here are some steps to make sure you're making the most of the tech you have available to you and get more valuable time with your clients.

1. Understand what it means to optimise technology use

Optimising technology means getting the right insights out of it, which is what you really want to use accounting software for. Software moves fast, with new features being added often so it pays to be prepared. Do you have a roadmap as a firm for adopting future phases of enhanced features that are coming?

When you optimise your technology use, you can move from spending more time on compliance to more time on advisory - becoming more relevant to clients like small business owners. You can spend less time on reactive compliance tasks and stretch to looking forward with the client, spotting opportunities, and being in tune with the current business world.

2. Gather data regularly

If your clients aren't using mobile apps or software to bring you data, then you're likely to be gathering data less often - primarily quarterly. This isn't what I'd consider an optimised data-gathering frequency.

Ideally, you'd have your clients submitting data using all the various available methods, from fetch to app scanning. You should be thinking about getting data in more regularly, and then what you're doing to process that data efficiently.

3. Process data frequently

I've seen some accounting and bookkeeping firms who've started to give tablets out to clients. They've said, "Anytime you get something which is of interest to us, I want you to scan it using the app on here - this is your Dext Prepare tablet."

You've got to educate the client on what you want them to do. Because if you don't tell them what to do, they'll do what they've always done.

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4. Make the most of automation

Once you've got information flowing through and you're not touching the processing, you have time to look at the insights. In an optimised world, you'd have a set process to consistently review files that need to be reviewed.

You've got a great opportunity to build dashboards using Precision, which are really going to be useful for you to trigger automated output and insights that will be useful internally and to your client base.

5. Implement your learnings

So many times I go into an accounting or bookkeeping firm and find they had some training on the software, but didn't start using it for ages. It's important to commit as a firm to adopting and utilising software as best you can.

Everyone has to understand what the adoption of technology means for them individually, but also for the firm and for the clients. And you've got to continuously review what's working and why.

At some point in the future, is your firm going to be proactive or reactive, focused on compliance or advisory? That's the decision that you need to make. And that will be underpinned by optimised adoption of technology.

Matt Flanagan, Co-Founder of Appacus, has been helping accountants and bookkeepers adopt technology for five years.

You can watch Matt's full workshop here

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