

A Guide to

# Implementing Accounting Automation in your Firm



# The Process

The process of implementing automation in an accounting firm can vary depending on strategy, company size, budget and industries served. But, in general, there are a few steps most cloud accounting specialists will take.

**Follow these steps** to successfully implement new technology in your firm:

01

**Assess the current technology infrastructure** of your firm to identify areas that need improvement.

### What specialists say

"The starting point is always to document the current procedure, to then interrogate the current procedure, and to be asking why we're doing things in the way that we're doing, whilst continually monitoring the risks, making sure that we are not in any way exposed - and then hopefully coming up with a new, more streamlined, more efficient process." - **Rebecca Roberts, Senior Manager and Head of UHY National Cloud Group at UHY Hacker Young**

## 02

**Identify the challenges** your firm is facing, such as data storage, security or streamlined workflows. Then identify the problems your clients have.

### What specialists say

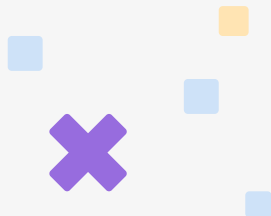
"Identify the problem, identify what the pain point is in your firm currently. What is causing your team pain? What tasks are they doing that they don't want to be doing, and is there a better way to be doing that? Breaking it down and finding the problem will help you to find the solution, and keeping that problem front of mind when you're looking for that solution will enable you to focus and have a successful project in that roll-out." - **Rebecca Roberts, Senior Manager and Head of UHY National Cloud Group at UHY Hacker Young**

## 03

**Research and evaluate new tools** that are relevant to the challenges you have and fit your strategy

### What specialists say

"I get two days a week where my job is dedicated to tech. Whether that's speaking to someone who's getting a certain software set up, someone who needs help with what apps they need... or whether that's just going out and researching what could add value to our client's business, or the firm itself." - **Ryan Alderson, Lead Cloud Accounting Specialist at Harold Sharp**



# 04

**Plan the implementation**, including timelines, budgets and resources needed. Consider potential challenges during this process and how to address them.

### What specialists say

“Sometimes depending on the size of your organisation, it will be a 12 to 18-month implementation plan. And that involves testing, supply vetting, reviewing, and then the hard work of actually implementing it, and that means having consistent communications.” - **Dayle Rodriguez, Systems Advisory Manager at Kreston Reeves**

# 05

**Provide training and onboarding** to team members and ensure they understand how each software can benefit their work. Make sure the team feels comfortable to train clients on tools you want them to use too.

### What specialists say

“In terms of buy-in from the team, we make sure that they've got adequate training and a structured policy or procedure around the use of that product to ensure they're totally comfortable and confident with what they're doing.” - **Rebecca Roberts, Senior Manager and Head of UHY National Cloud Group at UHY Hacker Young**



06

**Test and monitor** new software to ensure they are working and their performance is in line with what the firm needs. Continue to look out for any issues such as teams not using the tools at their full capacity.

**What specialists say**

“What aftercare are you getting in terms of account management? Because you can have the best piece of tech in the world, but if there isn’t consistent use of that, people will revert to what they already know.” - **Dayle Rodriguez, Systems Advisory Manager at Kreston Reeves**



07

**Perform ongoing maintenance and updates** on every tool to ensure they are functioning optimally and to keep them up-to-date with the latest advancements.

**What specialists say**

“Your firm needs to be really committed to it at the core of your strategy. It’s not as simple as setting things up and thinking ‘job done’ because technology continues to evolve and change.” - **Ryan Alderson, Lead Cloud Accounting Specialist at Harold Sharp**



## 08

**Communicate with stakeholders** such as senior management about the new technologies and the benefits they are bringing. The same goes for clients.

### What specialists say

“Talk to the clients, talk to staff and really embed that education piece and the culture of continuous improvement. Explain that it’s not about complicating anything, but utilising technology to make things more efficient.” - **Rachael Stewart, Client Advisory Manager at Mazars UK**

## 09

**Continue to evaluate** your tech stack and assess whether each tool is still bringing value to the firm. If necessary, make recommendations for changes and future implementations.

### What specialists say

“One of the things we established is a vendor evaluation process. With the speed at which technology changes, it’s hard to keep up. So you need to be consistently reviewing it, but not so much that you are changing every two to three months because everyone will get change fatigue - but not leaving it so long that you’re going to get left behind. We have a two-year evaluation process whereby we invite app companies to tender, we give them all preferred criteria, and then internally we mark them against the criteria with an adjusted score.” - **Dayle Rodriguez, Systems Advisory Manager at Kreston Reeves**



# Extra Tips

## Do

build a multi-function tech stack and commit to it. Train your team to use all the functionalities of each app and avoid duplication of tools.

## Do

dedicate time to the roll-out. It can take months to fully implement new software and get the team to use it at its full potential.

## Do

consider the needs of each client. Some will need more support and training than others, so account for this on your timeline.

## Don't

be led by your clients. Use the same tools across your client base and support them in implementing (or switching to) the software you chose.

## Don't

make decisions in one day. Take your time to research, trial and evaluate each step of the process, and communicate with your team as you go.

## Don't

become a stranger. Follow-up with clients to ensure they're using the tools correctly and keep in touch with the software companies to stay up-to-date.



"Historically, accounting and bookkeeping has been a very manual process. By having these automated systems in place, accountants can show their true value." - **Dayle Rodriguez, Systems Advisory Manager at Kreston Reeves**

"Firms that haven't yet adopted technology need to move soon. In fact, very soon. If you don't keep up with the cloud and embrace that move to it, you will lose clients. They will move to other firms that have the full package, the one-stop shop that can deliver the tax and the advisory on technology. The expectations from clients are evolving so much, and your services need to adapt with that." - **Rachael Stewart, Client Advisory Manager at Mazars UK**

"It's not about being a robot who knows everything about tech – no one knows everything. It's about understanding what challenges a client is experiencing and finding a solution that fits." - **Ryan Alderson, Lead Cloud Accounting Specialist at Harold Sharp**

"We've streamlined our processes internally that's enabled us to offer a more cost-effective service for clients or a service that we weren't able to offer previously. Or alternatively, if the client is using the product themselves, it helps to improve efficiencies internally for them." - **Rebecca Roberts, Senior Manager and Head of UHY National Cloud Group at UHY Hacker Young**

"I don't try to convince anyone, I just present the opportunity and let them see it for themselves. I sat down with a client who was resistant to change, and an hour later she was asking what else the computer could do for her. She went from being stuck in her ways to throwing herself in the cloud and using these wonderful features." - **Alex Clark, Accountant and Cloud Expert at Knights Lowe**

