



## A Better Way to Work: How workflow automation improves firm efficiency and eradicates “I’ll get back to you.”

### Introduction

How many times each day are you interrupted by a client or a member of your staff wanting to know the status of a project? Imagine that you could always provide an immediate answer — or better yet — they wouldn’t even need to ask. If projects were automatically routed through your firm and every professional knew exactly what to work on next, how much would that efficiency and collaboration improve the client experience?

Today, accounting firms can use technology to be more productive, provide better customer service and improve the bottom line. By implementing an automated workflow solution, you can streamline project management to be more efficient and effective while also gaining better visibility into client projects and firm activities.

All companies are trying to do more with less, and competition among accounting firms remains strong. Clients expect more value for their dollar. At the same time, the accounting industry faces increasingly complex regulations and rapidly changing technology. Many small firms are merging to boost performance and attract a broader range of clients.

What really differentiates firms today is how they respond to these pressures. Firms must look for innovative ways to enhance their services. Improving processes and leveraging electronic workflow applications can be an important step towards improving your firm’s competitiveness.

## Back-Office Processes Impact Client Service

You may assume that since clients don't see your firm's internal procedures, they don't really care how your back-office processes work. While this might be true, clients do care a lot about results. Refining back-office workflows allows firms to be more efficient, which can help you improve client service and satisfaction.

Most firms are hindered by many inefficient internal processes that reduce productivity. Redundant processes require staff to perform unnecessary steps. Client data often floats among several data sources that aren't connected or accessible to all team members. Inconsistent processes among partners create confusion within the firm and frustration among the staff.

Essentially, these inefficiencies result in a lack of transparency that makes it difficult to share information, know the status of projects and hold team members accountable. Without an automated, centralized project management system, a firm's workflow may be only a series of disorganized stops and starts.

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## The Benefits of Workflow Automation with CCH Access™ Workstream

### Automate Worksteps with Integration Throughout Your Firm

Workstream automates the workflow process, eliminating steps and reducing the paper flow among staff. Its unique electronic route sheet tracks a project's progress through a firm's workflow system. Unlike paper, these electronic route sheets never get lost. They are always attached to the right project and always accessible to multiple people at any time — allowing everyone on your staff to know a project's status at any time.

Route sheets integrate seamlessly with CCH Access™ and other CCH® programs, saving time and providing an uninterrupted workflow. From the route sheet, you can track time spent on a project. While working in ProSystem fx® Tax, you can access the route sheet to see the status of a return and ensure nothing slips through the cracks. Workstream can link to projects in ProSystem fx® Engagement, allowing you to open up a route sheet from single or multiple binders. Through integration with CCH Access™ Practice, you can examine a budget versus actual cost analysis report and even automate the billing process.

### Workstream Creates Consistency in Process

Workstream helps firms eliminate redundancy and define a consistent workflow process. Your firm is unique, and Workstream offers flexibility and scalability that enables you to track the exact level of simplicity or detail that each project requires. No longer will staff members have to adjust to the way different partners track jobs and complete projects. Workstream includes pre-built templates and masters that provide blueprints for tracking every activity in the firm. Users can easily modify these templates to meet their specific needs, bringing consistency in process and helping your firm's professionals save time. Each time someone completes a step in the process, Workstream reminds him or her to update the status, improving accountability for each task.

## What is Workflow Automation?

Workflow refers to the processes people, teams and/or systems follow to complete work. While a workflow can be a manual procedure, project management technology available today can empower you to automate your firm's workflows and achieve great efficiencies.

Project management software is designed to organize workflow and get it moving smoothly again. CCH Access™ Workstream is a project management tool that can help your firm manage all of its projects and processes. With Workstream, your team can attain a whole new level of efficiency that will improve profitability, performance and client satisfaction.

### Real-Time Reporting Improves Client Service

By collecting real-time information in one place, Workstream helps firms improve customer service and avoid costly penalties for late filings. On the dashboard, accounting professionals can see what projects are assigned to them and customize their workspace so the data they see is relevant to their work style. This keeps your team informed of project goals, additions, or changes and maximizes the efficiency of how professionals complete their work.

The CCH Access dashboard allows you to see the same information from the perspectives of both the client and the firm. The Client Dashboard shows all of the client's contact information, emails and the status of current projects. The Firm Dashboard provides access to all applications a firm uses and helps firm administrators track projects and staff responsibilities. From Workstream's Home screen, administrators can identify potential problems and reassign work to ensure all deadlines are met and clients receive the best service. In addition, you can allow staff to "work out of the drawer" and pull unassigned projects into their workspace, reducing unproductive and unbillable time between projects.

Workstream allows you to set automatic alerts and notifications to update firm management, staff and administrators of pertinent activity. Not only will Workstream alert staff when projects are reaching statutory deadlines, project deadlines and budget thresholds, but it will also notify the next person in the chain as projects move through the workflow. By using multiple parameters, Workstream will notify partners and other staff simultaneously when projects reach specific milestones. This gives you the ability to manage projects proactively.

Due dates for tax returns can change from year to year, but Workstream helps firms track these dates with ease. By pulling directly from the CCH Forms library, Workstream has access to the due dates for over 2,200 federal and state forms and can track multiple form due dates simultaneously. With this information readily available, your staff can ensure projects are turned in on-time and without the risk of penalty.

## Centralized Data Enables More Effective Collaboration

One of the most powerful features of Workstream is its ability to integrate across workflows. The foundation of Workstream is the CCH Axxess core, a common platform that helps firms eliminate information silos. This core shares data and services with other CCH Axxess modules such as Practice, CCH Axxess™ Tax and CCH Axxess™ Document. Staff members save time because they only have to enter client data once. Firm administrators have the same advantage with the ability to enter staff information one time and assign rights to applications as needed.

The CCH Axxess core also makes it possible for staff to access client information using their Smartphones and other mobile devices. With the ProSystem fx® Mobile app, users can see client and contact information anytime, from anywhere. Considering that accountants spend an average of seven hours per week working remotely, this is a significant time-saving benefit.

Finally, Workstream uses an open platform model so other vendors can tap into the data and create integrations to help users work more efficiently. CCH wants firms to have the best of breed tools available, whether they are from CCH or not. Firms can choose CCH as their technology partner while also maximizing their ability to work with other vendors that create the apps they need to leverage the power of their CCH solutions.

## Conclusion

As competitive pressures increase in the accounting industry, it's becoming more important to not only serve your clients capably, but also efficiently. CCH Axxess Workstream can increase the efficiency and effectiveness of the workflow process through automation and integration, giving firms the advantage needed to rise above the competition. These benefits offered in Workstream can help your firm boost both profitability and client satisfaction.

## What to Look for in a Workflow Automation Solution

As with any technology, choosing the right automated workflow solution takes planning, research and information. Here are some key characteristics of an effective automated workflow solution:

- Provides firm-wide capabilities
- Is easy to learn and use
- Offers the right delivery model for the firm (cloud vs. on-premise)
- Fits workflow management needs
- Is flexible and scalable to adapt to the firm
- Features robust, real-time reporting
- Includes integration capabilities
- Vendor has experience and a strong reputation
- Vendor offers implementation, training and support