Managing the High-Performance Team in the Client Accounting and Advisory Services Firm (Including Virtual Staff)

Workshop Tool
Staffing Your Client Accounting Services Practice – Tips for Success

Building the right team for your Client Accounting Service Practice (or division) is arguably what will determine your success. Establishing the right internal systems, acquiring the right clients, implementing the right technology solutions and other factors are certainly critical, but without the right team in place to serve your firm’s clients by using the systems that have been created, your ability to grow the practice will be limited.

In this guide you’ll find some general tips and resources that we encourage you to consider as you recruit, hire, mentor and retain your winning team.

1) Avoid Sharing Staff with Other Departments/Service Areas

In your CAS (Client Accounting Services) practice, your team will work with your outsourced accounting and advisory clients each week, month, year, etc. Unlike tax and audit projects that have a beginning and end and are not part of the client’s daily operations, CAS engagements are ongoing and often involve extensive hours working in close collaboration with the client as a true part of the client’s team. In addition, in order to provide the exceptional level of service your client expects and deserves, your team will need to be true “experts” in the use of the technology solutions you offer.

If you are providing CFO and advisory services in one or more specific industry verticals, your staff will need to dedicate time to staying current on the latest developments, opportunities, challenges, technology and other information about those industries. One important question to ask is, “if my client were advertising in the open market for someone to fill this CFO position, would the assigned partner or staff from our firm be the winning choice for that position?” If your client hired someone in the market for that position, it would be expected that he or she would “live and breathe” that industry, have an in depth knowledge of the client’s business operations, and be able to dedicate the time needed to move that client’s business forward as if there were no other competing interests. As you set the standards for the level of service you will provide, your firm will need to provide this for your client, including structuring your services in a way that your client does not feel like he or she is “a number” among your many clients.

Firms that attempt to staff their CAS practice by “borrowing” from the tax, audit and other departments creates several problems, just a couple of which include:

- Scheduling – as your staff (at various levels in the firm) provide outsourced accounting and advisory services for your clients, they will be responsible for the completion of the client’s transaction processing, preparing monthly, quarterly and annual financial closes, meeting with clients, preparing budgets and forecasts, and working on a variety of projects. There will be ongoing deadlines throughout the year, with a spike in workload at year-end as you close your client’s accounting records and prepare the necessary information for tax and other filings. Firms that assign the same staff to the completion of tax returns and/or audits quickly find:
The team is spread too thin and the ability to provide client-centric, responsive service is quickly compromised.

Error rates increase significantly – staff who are asked to multi-task by continuing to meet their obligations in the CAS practice while also being asked to complete tax returns and/or audits and other assignments will generally not have the time during the year to stay current in each of these practice areas, do not work consistently in each of these areas throughout the year, and as a result will not be able to provide the level of expertise of an equally competent employee who is dedicated to a specific practice area. As a result the risk of human error due to fatigue or lack of expertise increases significantly. Firm efficiency, accuracy, profitability, and the overall client experience may quickly suffer in this type of structure.

2) **Recruiting - Where to Look for Today’s Top Talent (Examples)**

There is no secret formula for finding exceptional staff. The firms that most successfully attract top talent are generally those that recruit candidates on a consistent, year-round basis, using a mix of lead generation resources. Your firm’s approach to recruiting will depend on a variety of factors, one of which is whether staff are required to work in a specific geographic location or whether you will consider hiring staff that work remotely. Some of the most common recruitment channels include -

- LinkedIn® Employment Ads (through “Jobs” service)
- Word of mouth (emailing appropriate contacts, calling contacts that may be able to help, etc.)
- CareerBuilder.com®
- Monster.com®
- Regional (and/or national) professional publications
- LinkedIn® Groups
  - Accounting Jobs and Jobseekers (subgroup of Hirespin)
  - State Society of CPAs
- Professional Recruiter
- College and University job boards

3) **Evaluating Resumes and Receiving Applications**

The following are some general suggestions for evaluating resumes and requesting applications.

- Review resumes for key words
  - Balance between history of long-term employment and diversity of experience. It is important to find someone that has a history of staying with an employer since of course the goal is to find someone that would consider staying with your firm for
years to come. At the same time, someone who has only worked in one or a very limited number of positions may not have the range of experience needed to serve a diverse client base. Someone who has only worked in public accounting may have difficulty understanding what it’s like to be a part of a client’s day-to-day business operations and therefore may have a more difficult time moving from a “project” environment to an ongoing accounting environment. On the other hand, someone who has worked in industry but never in public accounting may not have the depth of understanding of technology, CPA regulations, tax and/or audit background, etc. that generally help position a CAS professional for success working with a diverse client base. If the individual has been employed in one position for a long time and has not worked in a CPA firm previously, he/she may also not be accustomed to juggling multiple demands/deadlines from multiple clients at one time. It is entirely possible that any one of these individuals can become excellent members of the CAS team, but these are important factors to consider during the recruiting and hiring process.

- Software experience – does the candidate have experience using some or all of the technology solutions you use in your CAS practice?
- Employment and related expertise – does the candidate meet the minimum education and skill requirements for the position?
- Salary requirements (if you requested this in your job posting, which is strongly recommended) - asking this question can be helpful for a couple of reasons:
  - Knowing up front whether a candidate’s wage or salary expectations are in line with the position(s) you are offering will help ensure that it makes sense to continue the process. If the compensation being offered is not in the ballpark of the candidates expectations, it is important to address this up front so that all parties can determine if it makes sense to continue the process.
  - Does the applicant read and follow instructions? This may sound silly and simple, but one thing you are certainly looking for is a new hire that is able to read and follow requests/instructions from you and from your clients. If you ask for this and other information in your employment ad but the candidate does not supply it when they apply, have they followed your simple instructions?
- Track record of business development/social interests – has the candidate demonstrated that he or she has great social skills and is dedicated to personal and professional growth? Your CAS team will have frequent and ongoing communication with your clients and outside relationships, so their communication and social skills (even through email and telephone communications) needs to be exceptional. You want team members that not only get the job done, but who are able to contribute to the firm’s culture of sales and development with a client-centric focus. Candidates that show a history of being involved in their professional community and/or are involved in other community activities are more likely to be excited about helping to grow the CAS practice.
Once you have narrowed down your selection of resumes to those candidates that will be interviewed, it is suggested that you request a formal Application for Employment from each individual prior to scheduling the first interview. An Application for Employment offers several benefits, a few of which include:

- Compensation history (in addition to current desired compensation)
- Work history
- References
- Applicant signs the document stating that the information they have provided is true and accurate (which may be helpful in some labor matters)

In addition, every candidate’s resume will be formatted in slightly different ways. By requesting a standardized Application from each candidate, you will take the first step in comparing candidates using the same criteria. This is an approach you will want to take through each step in the recruiting and hiring process.

4) Interviewing

Interviewing potential new hires is the point at which you determine whether a candidate will be invited to join your firm. This person will become part of your team and will work closely with your clients. The financial investment in recruiting, hiring, developing and retaining a high performance team is significant, and the cost of hiring the wrong employee can quickly cost thousands of dollars. Even with all of this at stake, studies have shown that many firms spend a few hours or less on the interview process before deciding whether an offer will be extended to an applicant.

Taking an organized, multi-step approach to the interviewing process can help “test the waters” with candidates and lead them through a series of situations that will help give a much better sense as to whether they might be a “right fit” for your CAS practice. A sample of a multi-step recruiting and interview process might include:

- Recruiting Open House or Webinar – Firms of all sizes have found great success by holding monthly or periodic (but consistent) “Open House” receptions for applicants. This is a tremendous way to get that “first impression” of the individuals who have applied or may apply for a position with your firm. Many firms simply invite candidates to the office for one-on-one or small group closed room interviews. However, in “real life” the staff in your firm will need to be confident and comfortable interacting in both direct client AND group settings. By starting the process in this group environment you’ll get a unique opportunity to gage how each candidate handles a group setting, as well as how they interact with members of your firm and with the other candidates.

Do you employ remote staff? If so a great alternative is to hold monthly or periodic (but consistent) “Open House” events via the internet. With so many inexpensive and easy-to-use video conferencing options, you can easily invite candidates to this virtual get-together. This type of remote function requires a bit more structure as you will need to provide
individual opportunities for each person to talk and communicate, and you will want to start the call by sharing an agenda for the discussion. This will take some practice (so you may want to practice with your existing staff first in a role-play setting), but since you will be asking these applications to work remotely in the long-term, you’ll want to get a sense from the start of who would excel in this type of work environment.

- Telephone interview – a 15 minute (maximum time) interview with the appropriate supervising position (usually the Director of Client Accounting Services or a Partner) to get a general sense of the applicant’s communication skills, the “first impression” they give and would potentially give to a client or firm relationship in a one-on-one conversation, and to sell your firm. It is very important to keep in mind that top candidates will tell you about themselves, but they also know their value in the marketplace. It is not enough for you to ask them about themselves and what they might bring to your firm. You’ll also need to be able to give the candidate a clear sense of your firm’s vision, culture, mission, and why they would be happier as part of your team than in any other position they might consider.

- Skills Testing
  - General accounting and industry skills – usually multiple-choice, may be short essay or other format
  - Technology/application proficiency – this is especially important when an applicant states that he/she has experience using a specific application
  - Sample work scenario(s) – if given “sample” tasks to complete that are similar to what they would complete in their position with your firm, how does the candidate perform?

- Group interview – this is a live or remote meeting between the applicant and the members of your staff that they would be working with. Staff from your firm who will participate in this process should have prepared questions that have been reviewed and discussed with you in advance. This is an excellent opportunity for several things to happen:
  - Your candidate, who is now close to the final interview stages if he/she has made it this far, will likely not have had an opportunity like this before. It speaks volumes to a candidate if you are so confident about your firm and your team that you are able to leave the room/remote conversation and give the applicant a chance to freely ask their potential co-workers what it’s like to work for you and for your firm as a whole.
  - When you hire someone to join your firm, you will generally be asking your existing staff to provide or assist with the training process, to mentor and support the new employee, and to welcome him/her as a member of the team. By including your staff in the interview process, you are demonstrating from the beginning that you value their opinion and feedback, that you know they are also making an investment in the process, and that you know their support is critical to the successful hiring and development of this position.
  - By giving your staff the opportunity to provide their feedback and thoughts about the candidate to you after the group interview, they will often point out things they heard that you might have missed or absorbed differently. If your team has concerns about the candidate, this is an irreplaceable opportunity for you to hear those concerns and discuss them as a group. If the team supports the hiring of the
candidate, then they also generally seem to assume a much higher level of ownership and sense of responsibility for the success of the candidate than if they have been excluded from the process and are simply introduced to new staff that were hired without their involvement.

- Final Interview – this is the last step, and will generally be the return to a meeting with the firm Partner or Director that conducted the initial telephone interview. This is an opportunity for your firm and the candidate to discuss the steps that have been completed in the interview process, ask and answer any open questions (on both sides), and discuss the more granular aspects of a potential Offer of Employment (compensation package, benefits, potential start dates, reiterate the expectations for the position, etc.).

5) “Day in the Office” Trial

No matter how many questions are asked during the interview process or how much testing is done, there is nothing that can fully prepare a new hire or your firm for their first day. The hope is that your new hire will be able to jump right in and hit the ground running, get that he or she will get along well with your staff, and that their first day will be the beginning of a long term success story. However, most CPA firm partners and managers have also experienced the first day disaster, where a new hire is led through the orientation, is given tasks to complete, and it quickly becomes clear that this was not the right hiring selection after all. In fairness, working in a high paced CAS practice is also generally different than what most new hires will have experienced before unless they previously worked in the CAS department of another firm. They may be genuinely excited about the position during the interview process, but after “going live” in the position, they may decide that it is not what they imagined.

One positive way that firms have addressed this is through a “Day in the Office” trial. In this situation a candidate that has successfully completed the interview process and is likely to receive an offer of employment is invited to spend a day at the firm (or working with you remotely) completing a series of tasks and short projects that simulate what they would be doing in their “real job” with you. The tasks should be clearly defined and fairly narrow in scope. Since there is little orientation process involved at this point, unless the candidate has experience in the various technology solutions you use, you will not be able to expect that he/she complete tasks using all of those solutions. Instead it is ideal to walk them through completing small, pre-planned projects that have limited learning curves. The goal is to get a “live” sense of how quickly the candidate dives into their role, their approach to problem-solving and to asking constructive questions, the way that they interact with others on the team, and how quickly they pick up new processes that are explained to them.

It is true that one day at the office is a very short period of time and will not be a guarantee of success, but this one additional step is often the most helpful and revealing of the entire interview process. It can help highlight strengths and provide that final bit of assurance your firm needs to feel confident extending an offer. Or, it can uncover work habits and other issues that were not
apparent during the interview. These stories range widely, but some firms have reached this stage in the process only to have a candidate show up late to the office for that first day, others have found during this “trial” that the candidate could not format a client letter correctly and did not possess adequate writing skills to communicate effectively via email and/or letters, while still others have found that while a candidate may have tested well and claimed proficiency in the use of a particular software application, they struggled when assigned a task and asked to complete a series of steps independently.

Since your next step would otherwise be to extend a formal Offer of Employment to this candidate, it is easy to see how the investments in this one “trial” day offers enormous benefits for both the applicant and your firm. It provides each of you with the opportunity to “date” for a day before moving to a longer term commitment.

Note: When extending an offer to a candidate for this “Day in the Office” trial, it is important that you confirm that you are in compliance with federal and state labor laws, which is outside of the scope of this document.

6) Components of the Job Offer Package

Every firm will have a slightly different Offer of Employment package and supporting HR documents. As a general guide, the following is a sample of documents you will want to provide as part of any employment offer process:

- Offer of Employment letter
- Non-Compete Agreement
- Position Contract to be signed by both the new hire and the firm, confirming that the new hire understands the expectations for the position and how performance will be measured
- Firm Paid Time Off (PTO)
- Firm Holidays
- Telecommuting Agreement (if applicable)
- Pay-for-Performance Opportunities Summary

7) Technology Needed in the CAS Practice

The specific technology products and services needed by a CAS practice will vary depending on the structure of the firm, whether staff work in the office or remotely (part or full time), whether your firm visits clients on site or works with clients remotely, and a variety of other factors. For firms seeking to grow a CAS practice that offers the flexibility of staff working remotely and that is seeking to work with clients in a cloud-based environment, the following is a list of technology and related solutions that can make the process easy to implement:

- Windows 7 Professional Operating System is highly recommended as many SaaS solutions have virtual/mapped drive options that work best in a Windows 7 environment.
• Laptops with office and home docking stations are ideal for allowing flexible work opportunities and easily providing for multiple monitors, printers, scanners, etc. to be installed in both environments.
• Wired or wireless PC-compatible headset for internet phone calls and web meetings
• Adobe Acrobat Pro highly recommended
• Document sharing/transfer application such as ShareFile, SmartVault or other recommended
• Scanner – portable scanner that will duplex is ideal for both light office use and travel – examples are Fujitsu ScanSnap 1100 (color but does not duplex), ScanSnap 1300 (will duplex), or Canon P150
• Color laser printer
• e-fax® account or equivalent
• GoToMeeting and GoToWebinar, or Webex, or other similar meeting solutions (ideally with video conferencing capability) is a critical resource. It is recommended that firms consider a corporate account that allows (with several industry products) for:
  o Custom branding
  o An administrator role with the ability to add/remove individual firm users so that multiple staff can hold concurrent meetings
  o The ability to add a “widget” to the firm website so that clients can log in to a meeting right from the firm website if given a session/meeting ID
  o Usage and other account reporting

Each solution is slightly different, so it’s best to compare the options and consider what is best for your firm.
• Telephone system options
  o VOIP system with “follow me” features
  o Grasshopper®
  o Skype Business (with online phone number, call forwarding, voicemail and video calling options). Compatible with many of today’s smartphones.
• Redundant internet connection options
• Webcam (often built in to new laptops)

Recommended:
• Smartphone
• iPad
• If staff will be telecommuting
  o Landline (still important for high-quality client telephone calls)
  o Redundant internet connection options
  o Battery backups for computers, additional charged batteries for laptops
  o Webcam
8) Getting Started on the Right Foot

Congratulations on your successful new hire! Your Offer of Employment has been accepted, and everyone is excited for the first day to arrive. In the days/weeks before your new hire officially starts work, it is important to set the stage for a great first day. This will “wow” your new hire by showing them your firm is as awesome as you told them it was during the interview, you’ll save time from the moment the new hire starts their first day, and you’ll create a foundation for success.

A few suggestions (which will vary based on the specific structure of your firm) include:

- Get the new hire paperwork out of the way before the first day. Many firms welcome a new staff member to the office on their first day, and then ask them to complete their payroll and other forms. This unintentionally creates an environment where a new hire is led through the front door and then abandoned with a pile of paperwork (hard copy or digital) to complete, which is a waste of time on that exciting first day! As soon as the new hire returns their signed offer letter, it’s a great idea to forward the payroll and other forms to them with instructions for returning all of the necessary documents before their first day. This will also ensure that payroll, benefits and any other setup steps are complete and accurate so that “fire drills” can be avoided.

- Get the technology up and running – few things are more frustrating for a new hire than when they start their first day and are assigned tasks, but then find that they do not have access to the software and other resources they need to get started. This includes simple things such as a firm email address, Windows and server login credentials, etc. It also includes individual login credentials to the accounting (Intacct) and other technology solutions the firm uses to provide services to clients. Beyond the setup of the logins, it is important to test the permissions and other access rights that have been assigned to the new hire to ensure that they do have access to all appropriate solutions and features. For example, many cloud-based applications are designed so that staff will not see areas of an application, specific folders, or other items that they do not have access to. If they are new to learning an application this can create lost time and frustration as he or she “fishes” for what they have been told they have access to, only to find out later that the necessary permissions were not granted during setup.

- Review procedures documents with existing staff and ensure that all instructions are current — you’ll be able to save countless hours for you, your existing staff and your new hire by ensuring that your internal procedure documents and your client procedure documents are up to date and include any recent software releases/changes, updated 3rd party contacts, changes to client processing steps, schedules, etc. One of the best way to “test” your internal documents is through cross-training with your existing staff. Several times per year it is suggested that you have staff not usually involved with a particular process or client cross-train by asking them to complete a series of tasks using the procedure documents that have been prepared by others. Part of the cross-training process requests that the staff completing the training steps document areas where they felt confused by the instructions,
suggest changes/updates/corrections, and share ownership of this process until the final updates are made, reviewed and approved.

- Introduce your new hire to their “Buddy” – One of the easiest and most effective ways to help your new hire get started on the right foot is by introducing them to their “Buddy.” A firm “Buddy” is a member of your existing team who has temporarily been given a slightly reduced work load so that they are able to take the lead in getting your new hire up and running. The “Buddy” can send a letter or email to your new hire introducing themselves before the first day so that a connection is established early on. When the first day arrives, the Buddy is responsible for:
  - Giving the new hire a tour of the office. Or, if you employ a remote staff, the “Buddy” is responsible for giving the new hire an overview of the technology solutions you use to interact as a team and for providing a “virtual tour” of “how things work” within your firm. This should include introducing the new hire to staff they have not yet met but will work with in the near-term, reconnecting them with staff they may have met during the interview process, and answering any initial questions that new hire may have.
  - Orientation – during the first two weeks, the Buddy will be responsible for guiding your new hire through their training process, walking them through their first few assigned projects, and for making themselves available to answer questions. This is part of the reason it is so important that your Buddy is given a slightly reduced workload during this period. In many firms new hires are encouraged to ask questions, but then are left to feel that they are intruding because they do not know exactly who to reach out to with questions, they find that the staff they do ask for help are busy with too many tasks and are too frazzled to provide a welcoming and supporting response, and the process can quickly become both confusing and frustrating. By giving the Buddy a reduced work-load and therefore the time to be rested, responsive, positive and thorough, you’ll create an amazing onboarding experience for your new hire, save countless hours getting your new team member up and running, and dramatically increase the chances of long-term staff retention.

- Use a pre-planned orientation process that spans at least the first two weeks of the new hire’s position with the firm. This will help to avoid the trap of having a new hire start with the firm, only to find that staffing resources and client projects have not been adequately evaluated so that there is a clear plan in place for getting your new hire started on client work. It will also often help uncover any areas of your CAS practice that have become a bit disorganized and where new/updated systems may be needed as you find either you or your existing team cannot easily segment and delegate client work even though everyone is “buried” in assignments.

9) **Pay For Performance – Recognize achievements consistently and frequently**

We frequently hear the statement “I need staff that are driven by more than a paycheck.” One important question you need to ask as a firm, is what you are offering your staff beyond a paycheck? In this environment where firms of all sizes are competing for top talent, Pay for
Performance (we’ll include the non-cash flexible work arrangement options as part of this section) can often play a lead role in attracting and retaining winning long-term employees. Examples of several Pay-for-Performance options include:

- “At-Risk” compensation for all levels of staff
- Profit sharing based on profitability – individual, team and firm
  - May increase with # of years in the practice
  - $ earned grows as individual is promoted to higher levels of management with additional levels of reporting staff
- Guaranteed profit sharing/commission as a % of product sales
- Bonuses to staff and implementation team for add-on sales of products and services during 90-day client implementation period
- % of Profits on “Service Requests” (motivates staff to prevent scope creep*)
- Conference and networking budget
- Gift cards for employee suggestions that are implemented
- Increased opportunity to telecommute
- Participation in “Client Tours” and client gift selections
- R&D Budget (R&D Time and Funding)
- Paid day off for Birthday or company anniversary, etc.

**Managing a Virtual Staff**

Hiring and managing a virtual staff can provide tremendous benefits for your firm and for your team. It is no secret that the market for top talent in the accounting industry is incredibly competitive. Employers that want to hire and retain the best staff are quickly finding that by providing employees with the option to telecommute, offering flexible part-time and full-time work schedules, they stand a much better chance of finding and retaining the high performance staff the firm needs.

The thought of managing a remote team can be intimidating because historically as managers and partners we have been accustomed to being able to “see” the staff that report to us, know what they are doing during the course of the day, have easy access to them if we have questions or need assistance with various projects, etc. When working with a remote team this dynamic shifts tremendously. In this section we’ll cover several suggested processes and other tips that can help you successfully manage a profitable, organized, motivated staff while even keeping that sense of a “team” that is so critically important as part of the success of any firm. As you read this section you will no doubt find that many of these tips and practices are also “Best Practices” for a team that IS working in a physical office location, but their importance and usefulness is even more clear in a virtual environment.
The Essential CRM and Practice Management system

One of the most critical resources, if not THE most critical resource, for any efficient and profitable CAS practice is a well-designed CRM and practice management system that is actually USED as the day-to-day “hub” for everyone in the practice. The ideal system will allow your practice to manage your lead generation, sales and prospect-to-client process as well as your ongoing project and firm management through the one system, so that you are entering information in one centralized location that is shared among all appropriate people in the firm. Just a few of the things you’ll want to have access to within your CRM and practice management system are:

- Marketing campaigns (lead lists) and active prospects
- Client and Vendor lists (with the ability to set up individual projects/jobs that are associated with each client), with room not only for contact information but a system that aggregates all telephone calls with the contact, emails exchanged, links to client “Service Order Requests,” secondary contact associated with that relationship, time records for staff, recent billing history, open balances, etc. Ideally this screen will also have a location for both permanent notes about the contact that can be easily seen by anyone viewing that contact’s screen.
- Client logins, passwords and security information, with the ability to control who on your staff has access to this information for each client
- “Task Tracker” that allows you to enter, monitor and run reports regarding your pending deadlines. You should be able to run reports, at a minimum, by client, by the type of task/tax filing/etc., by a time period of due dates, and by staff member.
- Service Order Requests (“support ticket”) module/tab/feature that allows you to enter individual project requests from clients that are add-on’s to their core engagement and that could or will result in additional billings. This might include requests for special/custom reports, assisting with selecting new software solutions, running special projections, assisting with a new business venture analysis, and other projects.
- Time-tracking – the ongoing goal for the practice should be to continue to seek ways to get critical billing and staff performance information across the practice while minimizing the number of different applications your team needs to use to document notes, track their time. Since your system ideally will allow you to enter the tasks that staff need to complete for clients, both recurring tasks and special project requests, the ideal system will allow your team to simply “click off” the completed task and turn that in to their time entry. Many CRM systems do not yet offer this, so it is a “great to have” feature but may not be available. It is not suggested that you make this a deciding factor in your CRM and practice management decision, but you may want to inquire as to whether custom programming is available. The up-front investment can save your firm countless hours of staff administrative time and provide you with a much better range of management information. It’s helpful to
know that you have the option of adding this functionality to your system even if it does not come that way initially.

- Outlook, contacts, email AND calendar integration.
- Resource/staff management – you will want the ability to set up your staff individually and in teams, with the functionality to set very granular permissions for each individual in some areas and by staff level in others.
- Integrated document management/document portal that will allow you to share documents with your clients, and ideally will allow them to share documents with you.
- Key Performance Indicator (KPI) reporting options for marketing efforts, staff realizations and other performance measurements, etc.

There are many more features that a great CRM and practice management system should ideally have, but this list will get you started tackling some of the highest priorities. Building your “perfect” solution likely will not happen overnight. It is suggested that you choose a solution that will meet as many of your needs as possible, and then “live” in the application for a while, making modifications/improvements as you become clear about the specific needs of your firm. Many firms make the mistake of investing thousands of dollars for features they think they will need, only to find out they do not use all of them or would be better served by other options.

**Working Together as a Virtual Team**

There are many ways of working with your virtual team, so each firm will find its own “right fit” structure in terms of the mix of technology solutions used to work together remotely, the communication processes everyone uses, how “team building” opportunities are created, etc. What is provided here is a sample set of tips and processes used by one CAS firm that works with remote staff located in multiple states. They employ both full and part-time staff that are located in different time zones and that, even when located in the same time zone, work different hours each day. For example, one staff member works from 4:00am-1pm in order to accommodate family scheduling needs. Another staff member works from 11am-8pm EST as a lifestyle preference and also to more easily serve both east and west coast clients. Two additional staff members have been approved for a “job share,” where they each work 20 hours per week, together filling one firm position.

Using this example and the sections that follow, you will be able to design the model that is most appropriate for your situation.

- Use of your CRM and Practice Management system (from this point forward we’ll refer to it simply as your “CRM”) – this will ideally be kept “open” and active all day, and it should become second nature to you and your team to enter information into the system as you complete each task, conclude each client meeting, add requests for services from clients, update client contact information, access the logins you
need to work with each client, etc. If you were to imagine that you could not actually talk to your staff or coworkers (by phone, email, or any other means outside of your CRM) and they could not talk to you but you all shared each client you work on, what information would you need from others? What would others need to know from you? If you just concluded a phone conversation with the client, completed a task they requested from your team that has been reviewed by you and is final, or if the client has requested a new service from you and needs to be contacted by a member of your sales team, how would you share this information? If you need to know what tax filings and other deadlines are coming up, where your staff stands with the completion of each, whether they are waiting for information from the client or are ready for you to review the work, how would you know? By being disciplined about updating the CRM platform throughout the day, you and your team truly will be able to keep each other up to date on what is happening with each client and contact with minimal direct contact needed. Not only will this give the client a much better impression of you and your firm, but it will also help minimize the time spent reviewing each of these details in staff meetings which can often run very long and not accomplish as much as this type of system.

- Weekly staff updates – in the sample firm, the partners and managers each provide a short write-up that is consolidated into a “CAS Update.” This update gives the team information regarding:
  - New clients engagements “closed” since the last update
  - Prospects that are in the Engagement Letter stage and are expected to close in the coming week
  - Staff training schedules
  - Client news/accomplishments
  - Upcoming firm events
  - Staff suggestions that have been implemented
  - New staff welcoming introductions and highlights of staff accomplishments/promotions
  - Technology updates – this may relate to new software being implemented in the firm or for clients, new solutions being researched, “hot topics” in the industry, etc.
  - Any other news that can be easily summarized and shared with the group, especially if it is positive and creates “good energy” for the team.

The purpose of this weekly update is to give your entire team a sense that they are “in the loop” and a part of what is happening in the firm. When staff are working remotely, especially if they are each working from home, it can be easy for them to feel isolated. It is also more difficult to create the sense of a firm culture and the excitement that is created in an office environment when staff overhear excited chatter or talk with other partners and staff at the “water cooler,” etc. In addition, this
forces partners and managers to organize their thoughts each week into a consolidated communication. When used in conjunction with staff meetings these summaries can be referenced quickly to add to the “buzz” and excitement, answer any questions, and highlight the most important points. At the same time it helps to prevent the time waster that can result if partners and managers are not prepared for the meeting and instead “wing it” and need to fish for information, think “on the spot” about open issues, etc. Staff also have the opportunity to read this in advance and formulate their questions before the group meetings, or ask their questions offline when more appropriate.

- **Staff meetings** – It is recommended that you hold at least one full staff meeting each week, using a web conference system. Further, it is recommended that you consider making this call a video conference, where each staff member has been provided with a basic webcam and everyone can see each other during the meetings. There are several popular web conferencing systems available today that allow this. Some will allow more concurrent webcams to be shared, while others may not allow for as many to be shared concurrently but will allow participants to easily share and then turn off their webcam so that individuals speaking at a given time can share their webcams and then the next person can speak and so on…

- **Why is this such a good idea?** As discussed above, it is very easy for remote staff to feel isolated and that they are disconnected from any real community. By at least having the ability to “see” each other via web cam each week, it truly does give them an increased sense that they know each other, it makes it fun for them to collaborate, and it tends to create a much more “connected” team. This is also a great way for staff to practice meeting with others in a video environment, since meeting with clients and with others via video chat is becoming increasingly popular.

- **Instant Messenger** – The use of instant messenger can be a wonderful way for you and your team to communicate throughout the day. It can also be an excellent way to interact with clients vs. ongoing exchanges of emails. Some firms are very reluctant to allow staff to “chat” via instant messenger out of fear that firm productivity and profitability may suffer, that it may be used for “gossip” among staff, and for a variety of other reasons. For reasons similar to those described above, however, instant messenger can be an excellent way for staff to ask each other questions, share quick pieces of information about projects they are working on together, and see whether others in the firm are “available” at a given time. It has been increasingly common for staff within firms to use email to exchange short series of messages back and forth about a given topic, rather than simply using email as a digital form of a letter. It is not uncommon for individuals to receive well over 100 emails per day. An individual email that might be important can easily get lost in the shuffle, or it may not be read in a timely manner as we all struggle to get through the newest emails in the in-box and get caught up. Since Instant Messenger platforms generally create a specific message window and archive for
each conversation taking place, and since new messages are generally accompanied by a prompt of some kind, one staff member or a firm client can quickly send an instant message that the recipient can address either at that time or at a later time, with the entire conversation consolidated in one place. Most Instant Messenger systems even allow for the exchange of document files right within the message screen, some allow you to share your computer screen with the person you are chatting with, multiple participants can be included, and a number of other features are available. Once more this helps to support a “community” environment within the firm and keep everyone both connected and informed. This has also proven to dramatically increase the number of emails exchanged with both clients and staff, which can save a tremendous amount of time and frustration. It may also be encouraging to say that in many cases, because staff members are working remotely, there tends to be less of the “drama” or “cliques” that can sometimes form in a “live” corporate environment. While this is an information observation and exceptions may apply, this has generally led to the use of instant messenger for basic social exchanges, staff interaction and collaboration, and has had positive results.

** One important procedures tip when using Instant Messenger. While this can be a great tool, it can also become a management nightmare and time-killer, which can be prevented with this simple tip. This tip is described using Skype® as the application this firm utilizes, but the general suggestion will hold true regardless of the application used. Most Instant Messenger applications include a “status” option that a user can use to indicate their availability. It is STRONGLY recommended that you set aside time each day that you are available for messaging to answer questions, and make that time known to your team both on your calendar and by setting your status as “available” during that block of time. During other times of the day it is recommended that you set your status as “unavailable,” which will generally prevent instant messages from coming through (they will accumulate so that you can see them when you change your status to any other setting). In addition, if (in the case of using Skype®) you receive phone calls while you are noted as “unavailable,” those calls will be routed to voicemail so that you can listen to them during your next open block of time.

Why is this tip so critical? Remember that unless you clearly tell your team when you are available or unavailable they will not have any way of knowing, in a remote setting, when you can be disturbed. One person may send you a question via chat, and once resolved you continue to work. Since no one else will know that you have just been interrupted and have finally returned to productive work, a next person with a question may send a message to you, and then a next and a next. If left uncontrolled your entire day CAN become one of constant interruption and messaging. By using this simple practice this issues can quickly and easily be addressed. It is suggested that you teach your staff at all levels to follow this same
process, and communicate this to your clients as part of your procedures for working with them.

- The case for executive office suites – occasionally you may find a wonderful candidate for a position with your firm, who is just not suited for working at home. They may work best in an office environment or may have not have a space at home that is suitable for remote work. In that case it can be very helpful to consider what is generally known as an “executive suite.” These are fully furnished offices that can be rented either on a month-to-month basis or for a contract period, in many cases can be rented for a certain number of days per month or for the full month, and that offer a turn-key way for you to give a remote staff person the option to work in an office either part or full-time. This can be especially attractive for a new hire relationship since you can offer this option without a long-term office lease obligation. The cost of this type of setting has decreased significantly in many geographic areas. If this is set up based on the preference of the new hire, your firm can also consider whether this is defined as part of their compensation package so that it is clear that this is a benefit being provided to them and is factored in to their overall cost of employment. This can very important when calculating compensation and other perks in a pay-for-performance environment at the individual, team and firm levels.

- Get everyone together at an annual event – when you are working with a remote team, things that seemed like “normal” firm activities such as a holiday party, group signing of greeting cards, and other traditional things suddenly need to be approached differently. It cannot be emphasized enough how beneficial it is to find some way to get your full team together, in person, at least once each year. No matter how much they all communicate with you and with each other via chat, webcam, etc., it will not replace the excitement and morale-building opportunity that comes from time spent physically together. In the sample firm, part of the pay-for-performance model for the staff includes the attendance for all team members at a specific conference each year. During the rest of the year team members may attend different conferences when appropriate, but they all attend this one conference together (your firm may opt for a “firm retreat” that is not connected to a specific conference or other event, but this is one sample option). The staff all attend the conference just as all other attendees. Before the conference even begins, each attendee is asked to document a topic from a session that they plan to attend, and agrees to teach that topic to the rest of the team on a date during the rest of the year. This helps to encourage each team member to get the most out of their conference learning experience, and also helps to develop great firm presenters/communicators, while also building their confidence. In addition to the conference itself, the sample generally reserves a hospitality suite or similar accommodations at the host hotel location so that on a day immediately before or after the full conference, there is a “firm retreat” day. A series of activities and meetings are planned in which either everyone participates as a team or in small groups. One thing that is important is that these meetings NOT include any negative topics, performance
reviews, etc. The purpose of this day is really a “field trip” for your team, and the results of this one day truly can carry everyone through the year as they share stories about their experiences at the last conference, and discuss their excitement about the next one. By successfully pricing client engagements to include this conference budget and by incorporating this into the compensation model for firm staff, it REALLY IS possible to send everyone to one of these events. With the ease of cloud computing and successful pre-planning this has even been coordinated in a very positive way with firm clients so that they continue to feel well-served, while most of them (if you are serving the right clients) will also respect your firm for your commitment to staff development and support.

➢ The importance of Key Performance Indicators (KPIs) cannot be emphasized enough. It is critical that partners and staff in the firm have ongoing access to timely, accurate and relevant information regarding staff performance, firm profitability, sales and marketing results, and other key areas. As importantly, staff at all levels need to have access to information about their own actual performance compared to firm expectations and as their accomplishments relate to compensation and other reward opportunities. In a virtual environment, especially if the firm is offering flexible scheduling and other options, it is difficult if not impossible and it is certainly not desirable to attempt to manage the firm by “watching over” each team member. Attempting to do that can also quickly drain countless hours from a partner or manager’s day that should instead be spent on practice development, client service, and any number of other things. The selection and disciplined use of the right KPIs will keep everyone informed as to goals and benchmarks that are being met vs. areas where the firm and/or individuals are not meeting expectations. This provides a very concrete basis for discussions with partners and staff regarding firm strategy, staff performance, financial budgeting and management, potential new areas of business, and much more. It is also the thing that often feels most “freeing” to a partner or manager who has struggled by panicking about “how things are going” in the firm and who otherwise might be tempted to try to micro-manage. Developing the right KPI and Critical Success Factor (CSF) reporting structure can take some work to get set up and running correctly, but it really is the only way to know whether the countless hours you and your team spends working are paying off and keeping you on track toward your goals.

**Listening to your team**

The biggest secret to success is taking the time to listen to your team, request their feedback, and help them feel confident that they can share thoughts freely (even disagree with you) if done respectfully and constructively in their dealings with you and with the rest of the team. These conversations should include ongoing discussions about the ways the firm can continue to improve the process of working together and remotely with clients, and should be supported by ongoing reporting of results, setting new goals and specific timelines for completion, keeping staff involved in the implementation of new ideas and strategies, and loving the benefits of working in a virtual environment!