

Does Your Firm Face Workflow Challenges?

WHAT IS WORKFLOW, AND WHY IS IT IMPORTANT FOR ACCOUNTING FIRMS?

Workflow is defined as a 'progression of steps (tasks, events, interactions) that comprise a work process, and create or add value to the organization's activities.' An effective workflow allows firms to:

- Deliver high quality services at lower operational cost
- Effectively manage and delegate work tasks among employees
- Reduce errors and missed deadlines

Use this checklist of 16 workflow issues to understand where workflow improvements can be made in your firm. If you identify gaps in 2 or more areas, contact Doc.It to arrange a discovery call.

YES	NO	DO ANY OF THESE STATEMENTS DEFINE YOUR FIRM?
<input type="checkbox"/>	<input type="checkbox"/>	Scheduling is done in Excel.
<input type="checkbox"/>	<input type="checkbox"/>	Workflows are on white boards or taped to the wall.
<input type="checkbox"/>	<input type="checkbox"/>	Due dates are determined manually.
<input type="checkbox"/>	<input type="checkbox"/>	Tax season requires making room in storage for more paper files.
<input type="checkbox"/>	<input type="checkbox"/>	Staff does not have access to project-related email.
<input type="checkbox"/>	<input type="checkbox"/>	Documents are misfiled or may require you to leave your desk to locate them.
<input type="checkbox"/>	<input type="checkbox"/>	When staff is out-of-office, they may need to be contacted to locate documents.
<input type="checkbox"/>	<input type="checkbox"/>	Checking on the status of a job will require leaving your desk or checking with another person.
<input type="checkbox"/>	<input type="checkbox"/>	Tasks get missed and cause a "domino effect" of missed tasks by other staff.
<input type="checkbox"/>	<input type="checkbox"/>	When a client calls with a question, it is more common to require a search for an answer and call back the client versus answering the question on the spot
<input type="checkbox"/>	<input type="checkbox"/>	Some staff get substantially more work than others because it is difficult to gauge work volume.
<input type="checkbox"/>	<input type="checkbox"/>	Due dates have been missed.
<input type="checkbox"/>	<input type="checkbox"/>	Processes are handled differently depending on who is handling the work.
<input type="checkbox"/>	<input type="checkbox"/>	It is not easy to identify and resolve workflow bottlenecks.
<input type="checkbox"/>	<input type="checkbox"/>	It is not easy to move a client from one partner to the next for several reason (e.g. naming and filing conventions are not standard and processes are not standard).
<input type="checkbox"/>	<input type="checkbox"/>	We struggle with lack of accountability and transparency on completed work.



Global Headquarters
1425 Cormorant Drive, Suite 201
Ancaster ON L9G 4V5
Canada

USA
7848 W. Sahara Ave.
Las Vegas, NV 89117
USA

United Kingdom
4th Floor, Euston House
24 Eversholt Street
London, NW1 1AD, UK