

Developing & Managing the Paperless CPA Office

Learn how using technology can enhance your employee's skills, improve your firm's efficiency and keep your clients happy. This course will teach you how to develop and implement processes to eliminate wasted time and effort in your firm and in turn help you streamline your business processes, improve customer service and retention, lower expenses and be more productive and profitable.



Are You Ready—Exploring the Paperless Office— 4 hours

- Set goals, objectives, expectations
- Total support for and commitment to the process from the owner group
- Project champion
- Confirm benefits outweigh costs
- Changing Culture
- Planning consideration
- Potential barriers to success
- Importance of resources

Individual Tax Return Preparation—4 hours

- Review existing procedures
- Review processing procedures
- Evaluate new workflow options
- Implementation considerations
- Documentation of new policies and procedures
- Determine training needs

Corporate Tax Return Preparation—4 hours

- Review existing procedures
- Review processing procedures
- Evaluate new workflow options
- Implementation consideration
- Documentation of new policies and procedures
- Determine training needs

Financial Statement Preparation—4 hours

- Review existing procedures
- Review processing procedures
- Evaluate new workflow options
- Implementation considerations
- Documentation of new policies and procedures
- Determine training needs

Internal Office Procedures—4 hours

- Evaluate existing internal controls and procedures
- Evaluate new workflow options

