



Running a remote accounting team

12 people, process and technology tips to maximize efficiency and results in distributed teams

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Hello!

I'm Nick Sinclair, founder of TOA Global.

TOA Global is 100% designed for the accounting industry, enabling firms to grow, stay up to date, and service their clients with no limits, by supplying them with highly skilled people.

Recently, the COVID-19 pandemic has driven people in the accounting industry to change the way they do business, and where they do business from.

Remote working is an area TOA is intimately acquainted with, having provided more than 750 accounting and bookkeeping firms across the globe with more than 2,000 offshore team members. We've learned a lot along the way, such as the best people, process and technology tips to run a remote team.

If remote working is new to your firm, or you'd just like to learn more about how to manage a remote team, then these tips are for you.

Best wishes,

Nick

People tips for remote accounting teams

Staff members may experience a remote work setup differently from one another.
Here's how to keep your people on track.



1. Communicate from the top

A daily meeting over Skype or Microsoft Teams helps to reassure your team and keep everyone aligned. A typical meeting agenda may include:

- + Welcome
- + Good news story (highlighting a team member or client win)
- + Major items of business, important updates and/or your current focus
- + Questions
- + Wrap up

2. You can't collaborate too much

In a co-located workplace, popping into the next office or chatting around the water cooler is par for the course. When you're remote, you may need more regular check-ins to maintain communication and collaboration.

3. Maintain your rituals and culture

Many of our clients are adopting the "virtual equivalent" of their usual work rituals. For example:

- + Setting up a "virtual lunchroom" on Zoom
- + Sending staff cupcakes on their birthdays, as well as recognizing work anniversaries and other milestones as they would on any other day
- + Running "Friday afternoon drinks" every week. Whatever your cultural rituals are – keep doing them!

4. Understand how each person is affected

Some accountants and other finance professionals are used to working from home. For others, this is a new experience.

Team members may have the added pressure of working in a less organized environment, with their partner, children or other family members requiring attention.

Others will find they can get even more done from home. The important thing is to know what's happening with each team member, their families and community.



5. Create standardized systems for processes

Many teams are suddenly swamped with spikes of work in specific areas, such as:

- + Contacting the tax office to confirm payment arrangements or tax deferrals
- + Navigating current or upcoming government incentives
- + Creating cash flow projections for clients
- + Helping clients review and cut expenses
- + Helping clients access funding from banks and lenders
- + Formulating or executing disaster recovery plans
- + Planning for temporary or permanent closures
- + Some industries are experiencing peak demand and are looking for advice on rapid expansion

You don't need to achieve perfection, but it can pay dividends to create standardized systems for these processes so you can work more efficiently and get through the volume quickly.

Delegate more work to less experienced internal resources to free up your best strategic and relationship people.

It's quick and easy to:

- + Map out a process with flowchart software, such as Visio or Lucidchart
- + Record a quick video where you run through the process once
- + Post the video to your knowledge base
- + Tell your team about the new systems during your daily huddle/meeting



6. This is a great time to “Clean Up and Catch Up”

Verne Harnish, author of *Scaling Up*, has written [5 Cs for leading in a crisis](#).

The third “C” is to “Clean Up and Catch Up.” While there may be more urgent things to attend to right now, when the dust settles it will be the perfect time to:

- + Reset your direction
- + Polish processes
- + Focus on the areas where you add the most value
- + Get rid of waste
- + Build capacity in the right areas
- + Get ready to go again!



Technology tips for remote accounting teams



7. Implement video conferencing software

Zoom and Microsoft Teams are the front-runners in this space, although there are many options.

8. Consider a help desk for managing client workflow

Apps such as Help Scout, Zendesk and Intercom are good for managing client enquiries in a systemized way. Their key advantages are:

- + Providing one central way for clients to submit queries to your firm
- + Allowing any team member to respond to any enquiry
- + Setting up a “triage” process where team members are rapidly responding to standard queries and referring others to the best person internally
- + Leveraging auto-suggested responses to common queries, allowing you to reduce response times
- + Preventing requests from getting “lost in the inbox” of individual team members

9. Use Loom for quick videos

This is our all-time favorite tool right now. You can use Loom for so many things, including:

- + Providing feedback (it’s much faster than typing it out)
- + Sending updates to team members
- + Sending messages of support to clients
- + Updating a client if you can’t get him or her on the phone
- + Recording marketing videos
- + And much more!

10. Use Microsoft Teams or Slack for unified communication

These are supercharged “chat” tools with a host of integrations.

You can manage the flow of messages through channels and other preferences. These tools are great for getting a quick answer (equivalent to “popping your head around the door”).

Just be mindful they can also interrupt focused work. Use the settings to control when and how team members receive messages.

11. Review cybersecurity arrangements

When team members start working from home, they may be exposed to a non-standardized IT environment which can expose your firm to increased cyberthreats.

We recommend apps such as Practice Protect to lock down these additional risks and keep your people working efficiently as they access your cloud apps. Check out [Practice Protect’s cybersecurity tips for remote teams](#).

12. Share updates with clients

Communicating with clients regularly is mission-critical. Accountants who are used to dealing with clients via email are now picking up the phone and having a real-time conversation.

Our clients are using a range of tools to keep their clients up to date. In addition to the obvious ones such as email, these tools include:

- + Facebook Live videos. Zoom has a Facebook Live integration that many firms are using
- + Membership sites or client portals, where premium content can be housed (e.g., templates, checklists, webinar recordings). There are many solutions, including Teachable and Podia



Connecting you to the accounting people is connecting you to scale, quality, and time

Every day we're hearing stories of accounting teams who are using the impact of the pandemic as an opportunity to serve, learn and grow.

Many firms have turned to outsourcing their work to global team members in order to grow. By doing the hiring, upskilling and resource management, TOA Global enables firms to focus on responsiveness, servicing demand or growing their businesses without the concern for hiring, training, managing or deploying resources, especially in a highly competitive market for talent.

If you'd like to explore how outsourcing can help you grow your practice, book [a free chat](#) with one of our account executives today.

Because great accountants make the difference between good and great businesses.