

WORKFLOW WIPLASH

BREAKING FREE FROM CHAOS-CAUSING HABITS

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Welcome!



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A visionary leader, tech nerd, and CAS expert with over two decades of accounting experience, I am passionate about empowering accounting professionals to drive financial success and operational efficiency; by implementing strategic CAS solutions, I help firms enhance their services and elevate their client business.



I. Introduction

II. Exposing the Real Bottlenecks

III. Deep Drive into the 5-Step CALM Plan

IV. Tools and Tech

V. Q & A

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INTRODUCTION

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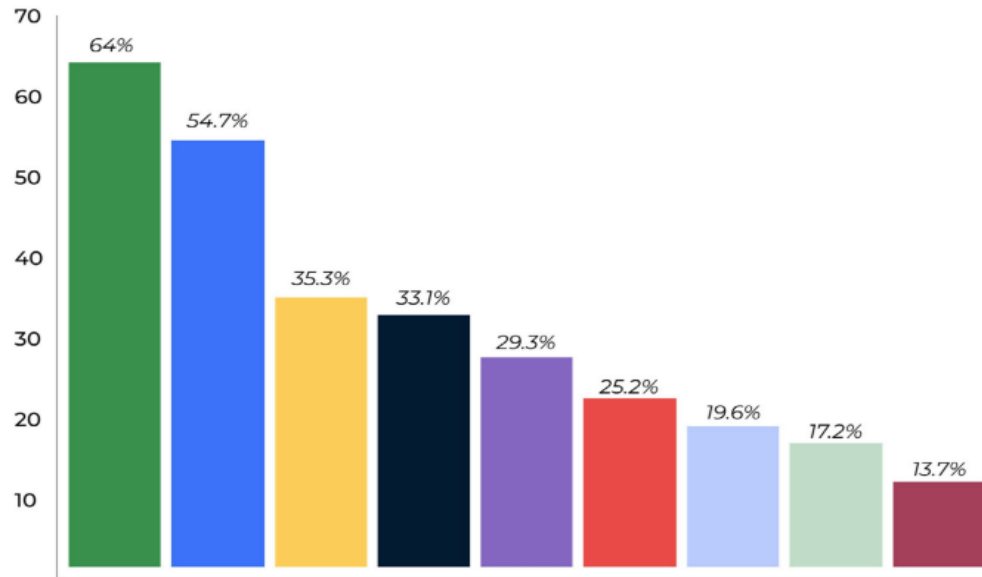


Reviewer, Sept 2025

“What I like most about Financial Cents is how seamlessly it combines client management and workflow automation in a very user-friendly interface. ... Their customer service is excellent, responsive and genuinely supportive.”

”

FIRMS FACE SEVERAL WORKFLOW INEFFICIENCIES THAT IMPACT PRODUCTIVITY AND SERVICE QUALITY:



The State of Accounting Workflow Automation 2025 Financial Cents

- Chasing down clients for information** - The most common bottleneck, emphasizing the need for automated reminders and better client communication tools.
- Manual administrative tasks** - Repetitive tasks take up valuable time, making automation a key priority for efficiency.
- Onboarding new clients** - A slow, unstructured process highlights the need for standardized onboarding workflows.
- Poor work visibility** - Lack of transparency in task progress calls for workflow management tools.
- Poor systems and processes** - Inefficient internal operations hinder productivity, stressing the importance of process optimization.
- Too many processes and tech to manage** - Disconnected tools and overly complex workflows create inefficiencies, highlighting the need for tech stack consolidation.
- Employees not following set workflow standards** - Inconsistent adherence to processes results in missed steps and inefficiencies, underscoring the need for accountability and training.
- Poor work handoff process** - A lack of structured task transitions leads to miscommunication and errors.
- Onboarding new employees to client work** - Difficulty in training new hires delays productivity, emphasizing the need for structured onboarding and documentation.

EXPOSING THE REAL BOTTLENECKS

01

Reactive Client Work: Living in Response Mode

Symptoms of Reactivity:

- Work starts and stops based on when clients “finally send what we need.”
- Team capacity is unpredictable week-to-week.
- Deadlines are met with heroics rather than process.
- Client expectations shift constantly because no one resets the boundaries.

Root Causes:

- Lack of clear client timelines or onboarding education.
- Staff conditioned to “drop everything” when clients email.
- No visibility into *who’s waiting on whom*.

Impact:

- Burnout for staff.
- Constant context switching reduces productivity by 40–50%.
- Client trust erodes when deadlines slip or deliverables feel rushed.



02

Unstructured Intake: The Chaos of Client Information

Symptoms of Unstructured Intake:

- Endless email threads: “Did you send that file?”
- Files buried in inboxes or Drive folders.
- Team members working from outdated versions.
- Delays caused by chasing the same document multiple times.

Root Causes:

- No standard intake process or checklist.
- Inconsistent client education on “how to send info.”
- Overreliance on manual tracking or email communication.

Impact:

- Hours lost weekly searching for missing files.
- Rework when wrong or incomplete data is used.
- Team frustration and client misalignment.



03

Siloed Tools: When Your Systems Don't Talk

Symptoms of Silos:

- Tasks tracked in spreadsheets or Trello; docs stored in Drive; emails in Outlook.
- No single source of truth for client status or deliverables.
- Staff duplication — two people chasing the same item.
- Delayed handoffs between departments (tax, CAS, bookkeeping, advisory).

Root Causes:

- Over-adoption of disconnected tech.
- Fear of migrating to an integrated workflow platform.
- Lack of process mapping before implementing tools.

Impact:

- Time lost toggling between systems.
- Increased error rate due to miscommunication.
- Inconsistent visibility for firm leadership.



DEEP DIVE INTO THE 5-STEP CALM PLAN

The 5 Step CALM Plan

- 01 Clarify
- 02 Align
- 03 Leverage
- 04 Measure
- 05 Maintain



01

Clarify – Reveal the Hidden Chaos

Goal: Identify what's truly creating bottlenecks.

Insights:

- 55.5% of firms cite *workflow inefficiencies* as their biggest pain point
- The top causes include *chasing clients for information, manual admin tasks, and lack of workflow visibility*

Action Points:

- Conduct a workflow audit: Where are tasks delayed or duplicated?
- Use Financial Cents-style visual workflow tracking to see where work “falls through the cracks”.
- Bring visibility to every process—no hidden work, no invisible bottlenecks.



02

Align – Redefine Roles, Boundaries & Expectations

Goal: End reactive habits by realigning who owns what.

Insights:

- Firms struggle when *clients send documents in multiple formats and fail to respond promptly.*
- *“Set clear client expectations, maintain control of engagements, and ensure clients align with your firm workflows.”*

Action Points:

- Map responsibilities for *both staff and clients.*
- Create *client agreements* defining communication norms and submission deadlines.
- Realign internal accountability—every task should have an owner, not a crowd.



RACI Chart

Task/Role	Role 1	Role 2	Role 3
Task 1	R	R	I
Task 2	A	C	C
Task 3	A	I	I

Definitions

R = Responsible

A = Accountable

C = Consulted

I = Informed

03

Leverage – Standardize & Automate Intentionally

Goal: Use technology to eliminate chaos, not create new silos.

Insights:

- 54% of firms now use accounting workflow software, and *automation has led to better standardized processes, faster work completion, and improved collaboration*
- Firms that succeed combine automation with clear structure and human oversight

Action Points:

- Automate repetitive tasks—document requests, client reminders, and onboarding Implement consistent templates for recurring work
- Keep automation human-centered: AI supports your brain; it doesn't replace it.





04

Measure – Turn Data into Direction

Goal: Replace emotion-driven chaos with data-driven calm.

Insights:

- Top metrics for measuring workflow success: *operational efficiency, client satisfaction, and meeting deadlines*
- Firms using centralized data tracking achieved *faster document turnaround and smoother collaboration*

Action Points:

- Track KPIs for turnaround times, staff capacity, and client response rates.
- Use dashboards to visualize progress and bottlenecks.
- Create a culture of *reviewing workflows quarterly*—only 23.7% of firms currently do this



Auto date range

This Week

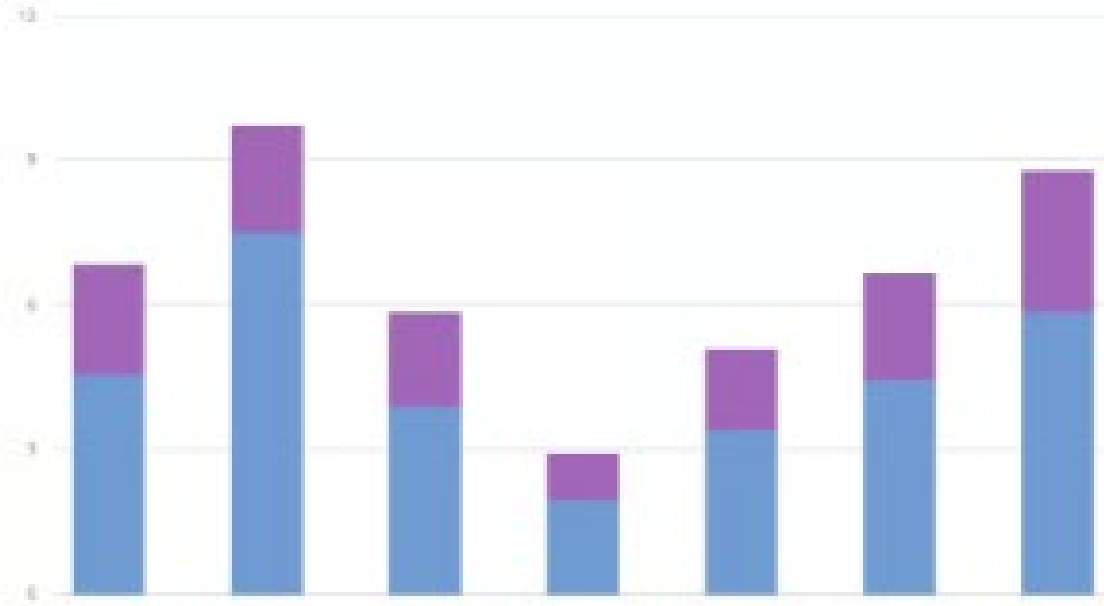
Services

All

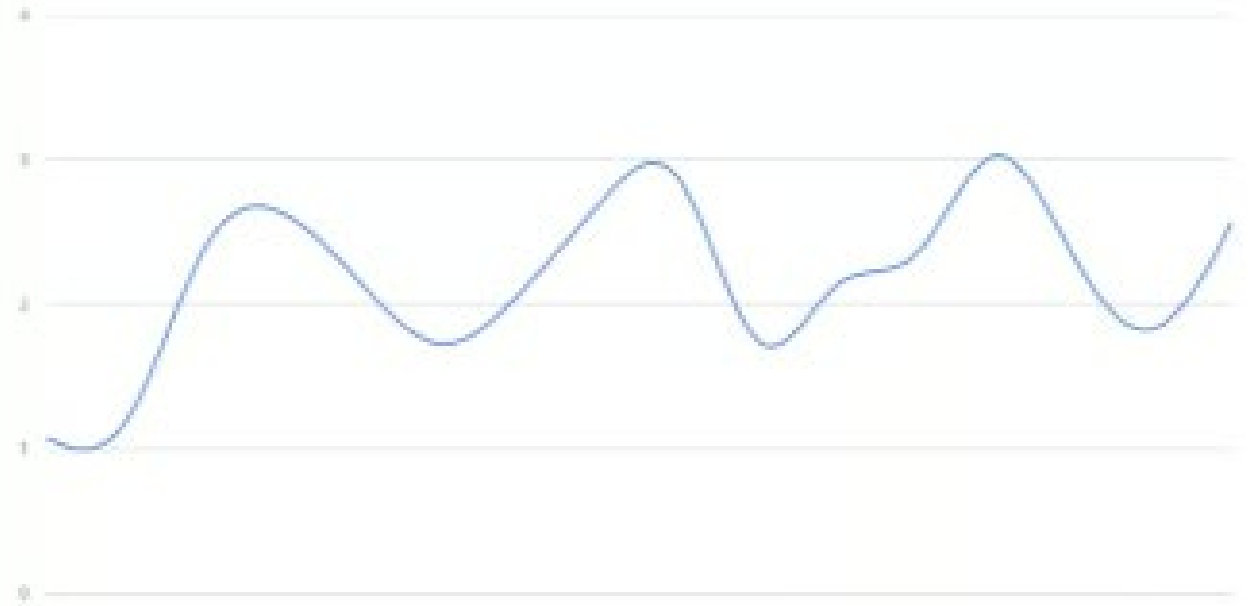
Points

All

Debt-to-Equity



Net Profit Margin



Sales

478

↑ 13%

vs previous 7 days

Leads

6

↑ 1

vs previous 7 days

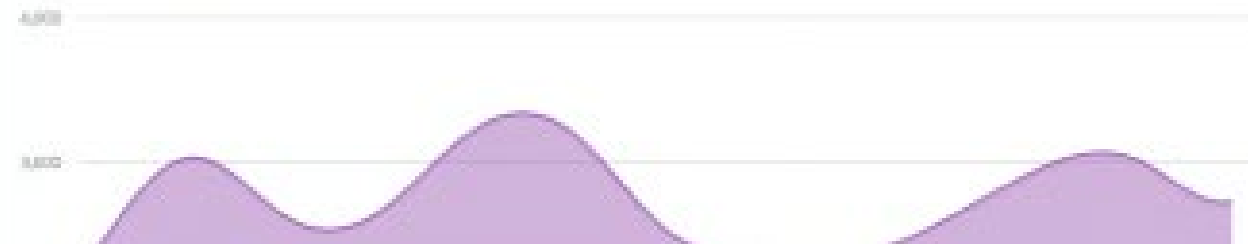
CPL

\$7.2

↑ \$1.2

vs previous 7 days

Gross Profit Margin



05

Maintain – Reinforce the Calm Culture

Goal: Make calm the default operating mode of your firm.

Insights:

- Firms that standardize processes report *smoother onboarding, less burnout, and more collaboration*
- Leaders stress the power of early process design and consistent training.

Action Points:

- Establish a rhythm of workflow reviews and feedback loops.
- Celebrate calm—reward efficiency and predictability, not heroic firefighting.
- Train teams continuously on updated SOPs and automation tools.





CALM SUMMARY

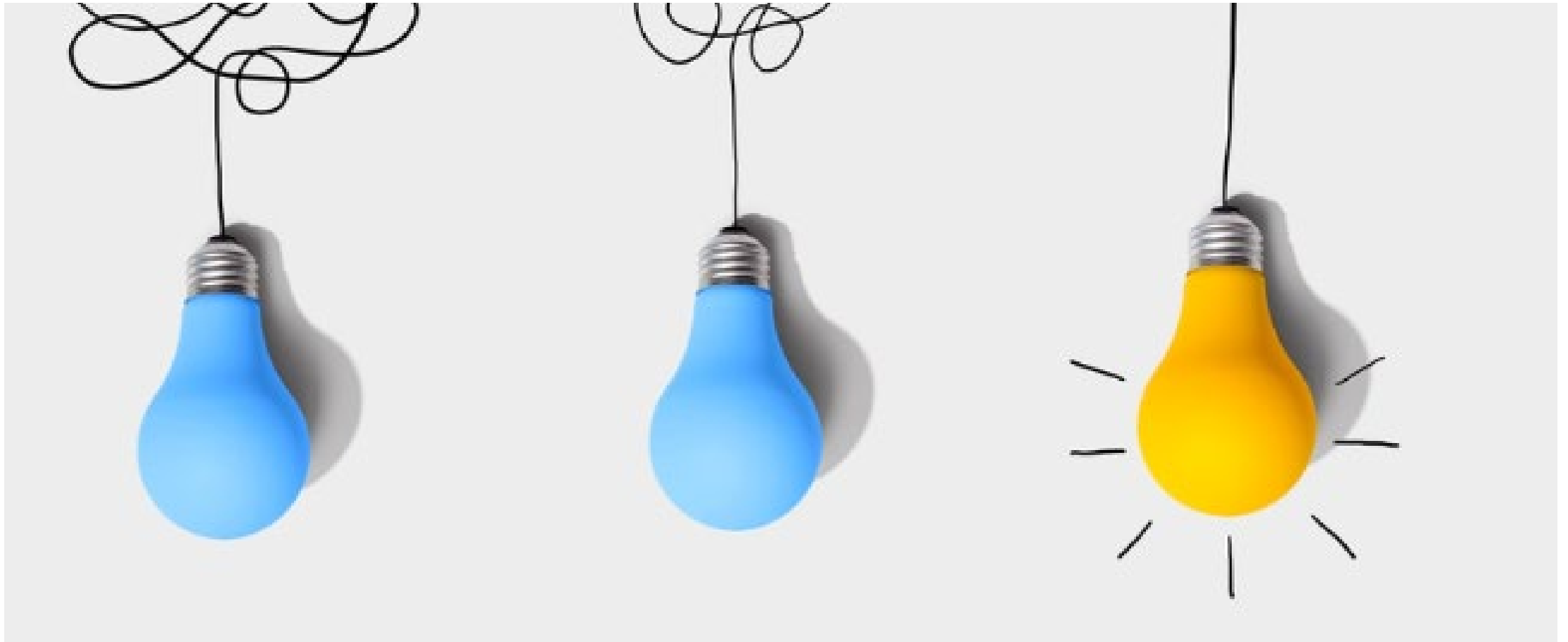
STEP	FOCUS	OUTCOME
Clarify	Identify bottlenecks and friction points	Visibility & Awareness
Align	Redefine roles and boundaries	Ownership & Structure
Leverage	Automate intentionally	Efficiency & Flow
Measure	Track what matters	Data-Driven Decisions
Maintain	Reinforce calm culture	Consistent, Scalable Success

TOOLS & TECH

THE BENEFITS OF WORKFLOW AUTOMATION

BENEFIT	OUTCOME
Eliminates Manual Follow-Ups	Reduces client chasing time by up to 80%
Improves On-Time Delivery	Firms using automation report 30–50 % faster completion rates.
Standardizes Processes	Every client experience becomes consistent and scalable
Enhances Collaboration	Centralized communication eliminates information silos.
Drives Profitability	Less admin time – more advisory hours

From Chaos to Clarity



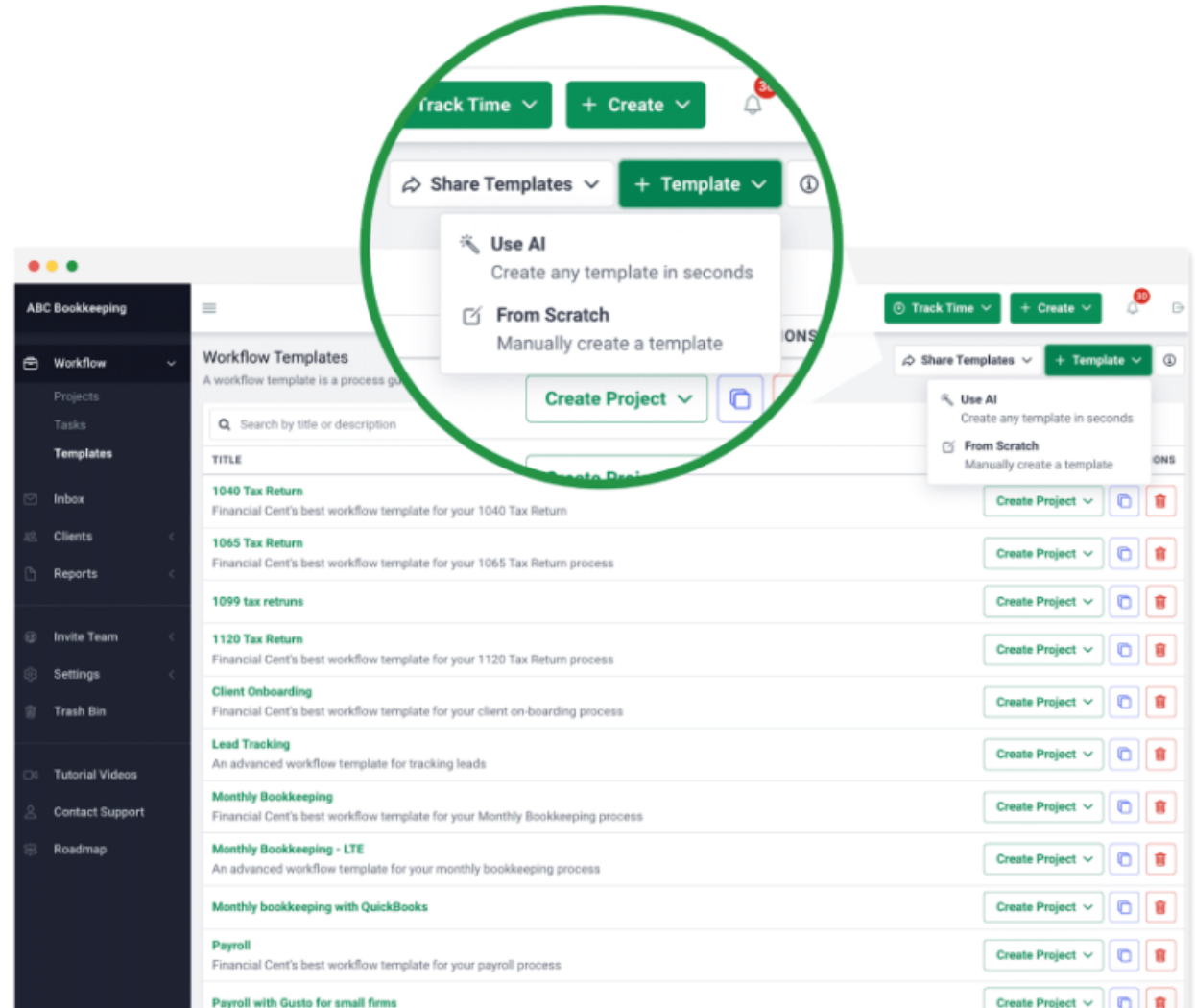
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- Communicate with clients professionally
- Stay productive

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▶ What we do





LET'S TALK

Q & A

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