



# Advanced techniques to automate your workflow

[karbonhq.com](https://karbonhq.com)



# Meet your host



**Ian Vacin**

Karbon

Chief Customer Officer



[karbonhq.com](https://karbonhq.com)

- 1. Close down any open apps**
- 2. Ask and we'll answer**



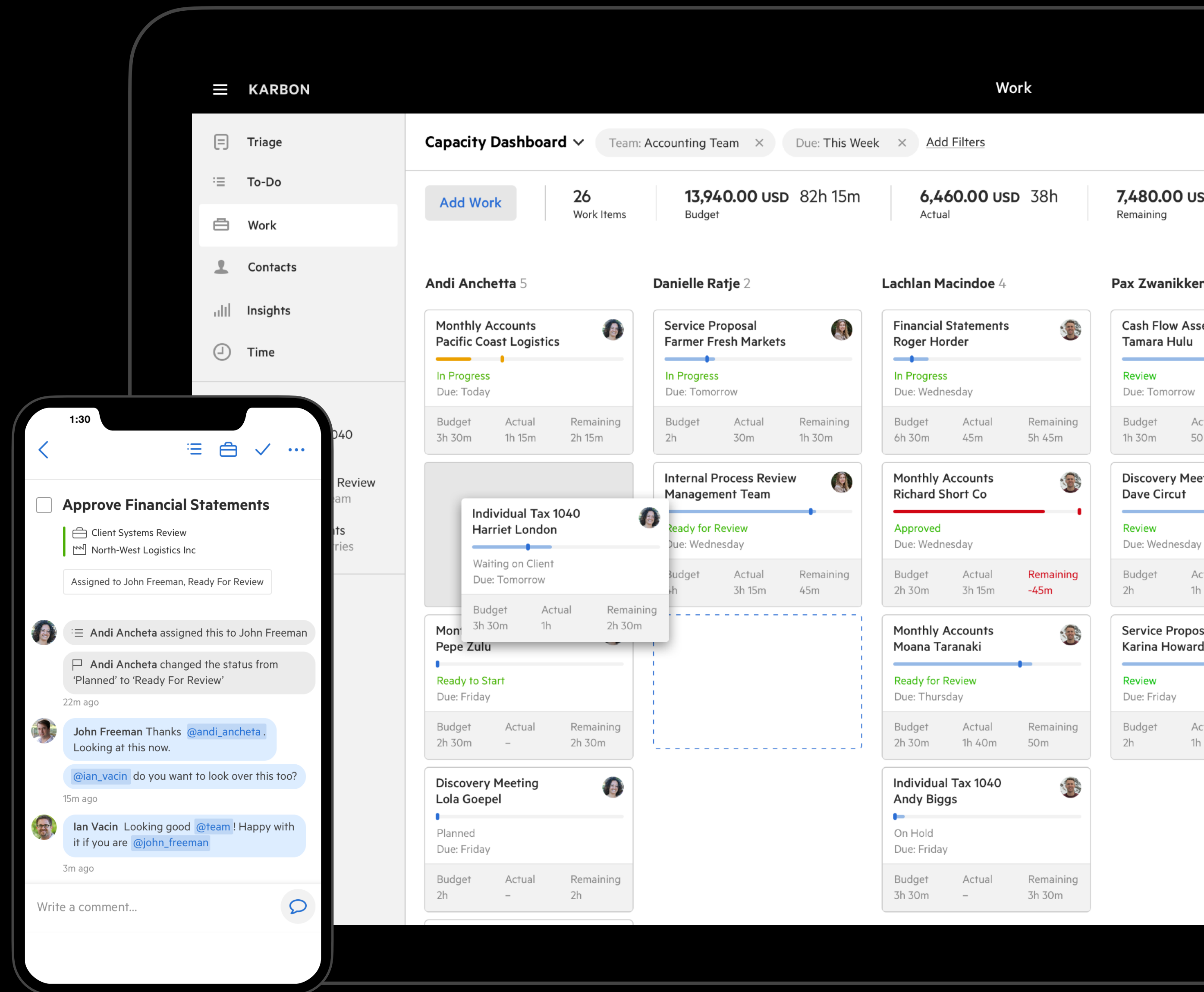




# Work Management Software for Accounting Firms

karbonhq.com

GET STARTED





*“Knowing and choosing when to be inefficient, becomes your difference.”*

— Adrian Simmons, Elements CPA, Chief Creative Designer



- 1. The state of automation**
- 2. Keys to automation**
- 3. A modern tech stack defined**
- 4. Designing an efficient firm**
- 5. Examples in automation**



# The state of automation





# What do all these words have in common?

Virtual assistants

Value Pricing

Blockchain

Cloud

Advisory

Chat bots

Machine Learning

Financial Web

Automation

AI

Big Data

Robotic Process Automation



What do all these words have in common?

Virtual assistants

Value Pricing

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Cloud

**Buzzwords!**

Chat bots

Machine Learning

Financial Web

Automation

AI

Big Data

Robotic Process Automation



# Let's play some Buzzword bingo!

## Buzzword:

- Big data

## Definitions

- A. Capability of a machine to imitate intelligent human behavior.
- B. A field of AI that uses statistical techniques to give systems the ability to "learn" from data, without being programmed.
- C. The use of software with AI capabilities to handle high-volume, repeatable tasks that required humans to perform.
- D. Extremely large data sets that may be analyzed computationally to reveal patterns, trends, and associations.





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- Machine learning (ML)
- Robotic Process Automation (RPA)

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# Technology impact on us & customers over time

## Phase 1:

- Auto-configuration
- Auto-reconciliation
- Control chart alerts
- Trxn completion assist
- Benchmarking
- Matchmaking

## Phase 2:

- Trxn auto-completion
- Error ID & solve
- Scenario assistance
- Loan facilitation
- Financial web

## Phase 3:

- Confirmation-based activities
- Predictive insights
- Scenario analysis & answers
- Workflow objects



# The keys to automation



# Traits of growing, scalable practices

- Services are productized.
- Work is systematized.
- Relationships are personalized.





# Considerations when automating

- Eliminate, automate, delegate. *#NoAdmin*.
- Improve efficiency before automating.
- Start small (or with what bothers you).
- Technology is an enabler and amplifier.
- Learn from others.
- Get help if you need it.
- Build a culture. Give it ownership.



# What to automate?

- **Skill:** Low-level tasks (e.g. manual data entry).
- **Volume:** Repetitive, repetition, repetition.
- **Complexity:** Simple and systematic.
- **Value:** Must be worth the time & tech to invest.
- Anything can be automated. Should it?



*“Automation is best for common, constant and systematic tasks that follow a standard pattern.”*



# What not to automate?

- Everything.
- The uncommon or one-off.
- Low ROI.
- The complex.
- Customer touch points.



# Steps to automate

- Optimize your current processes.
- Pick your tech stack and partners.
- Automate the easy workflows (or tasks) first.
- Set your targets. Track results.
- Refine and optimize.
- Repeat with a new workflow (or task).



# A modern tech stack defined





Client facing

Practice facing

Client services	Client management	Communication	Practice management
Audit	Client dashboard	Client communication	CRM
Advisory			Billing
Tax	Client collaboration	Practice communication	Projects & tasks
Accounting			Timeline & history
Bookkeeping			Staff & time
Payroll	Small business intelligence		Documents
IT consulting			Workflow
			Practice intelligence



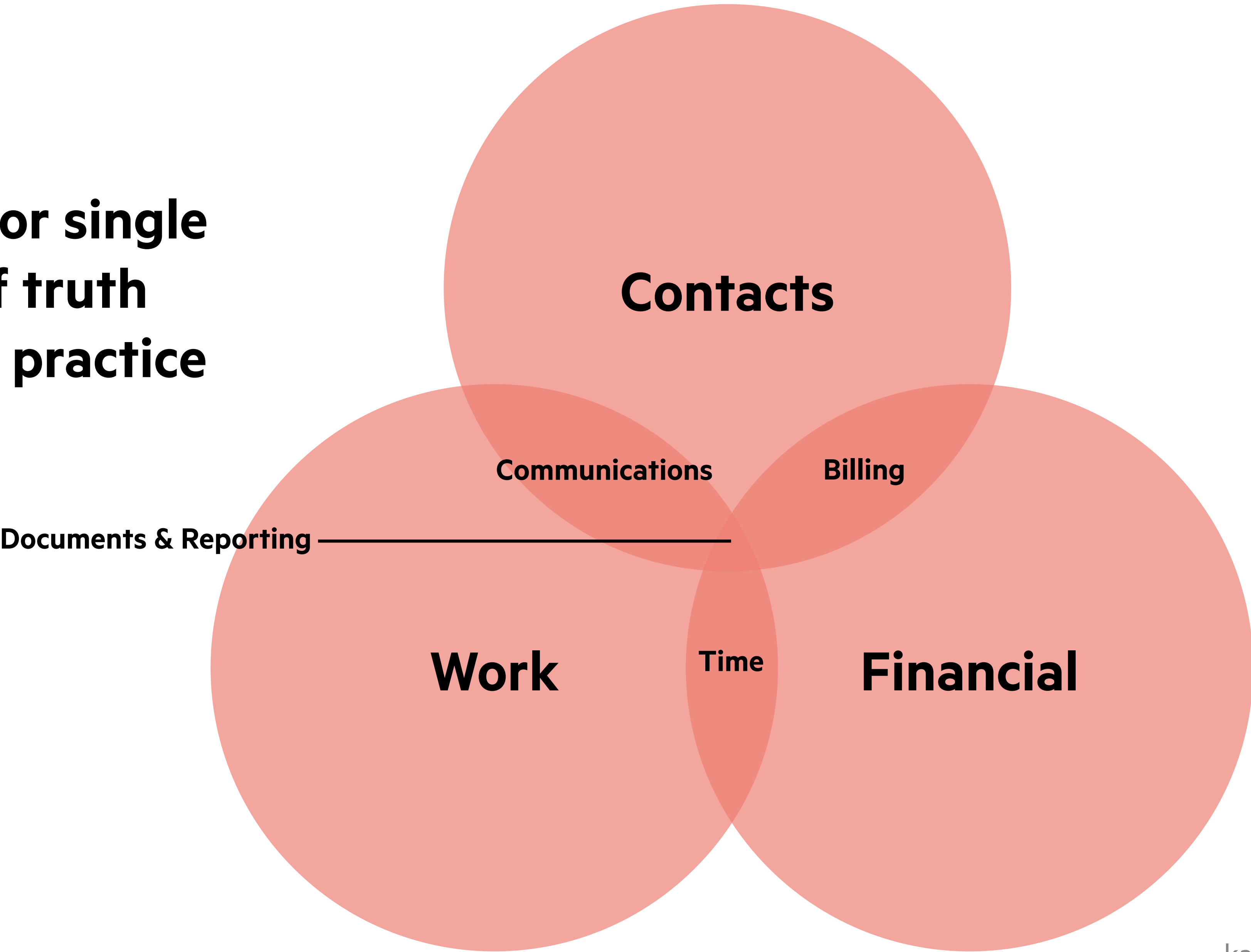
# Categories defining PM:

- Customer Relationship Management
- Billing & engagement management
- Staff & time
- Workflow & processes
- Project & task management
- Timeline & history
- Document management
- Practice Intelligence



ACCOUNTING ECOSYSTEM TECHNOLOGY <small>ACCOUNTEXUSA.COM</small> 2017									
Version 3.1   Updated 8/28/17									
ACCOUNTING SOFTWARE			BUSINESS INTELLIGENCE			CRM		PAYROLL	
HR			HOSTING			ERP		WORKFLOW	
BILL PAY			TIME TRACKING			PROJECT MANAGEMENT		DMS	
PRACTICE MANAGEMENT			FUNDING			INVENTORY MGMT		TAX PREP SOFTWARE	
FIELD SERVICE MGMT			ACCOUNTING ADD-ON			TAX TOOLS		EXPENSE MANAGEMENT	
INDUSTRY SOLUTIONS			MERCHANT SERVICES/ E-COMMERCE			POS		EDI	
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**Designing for single  
source(s) of truth  
within your practice**



**On an island?**  
**Good for vacation. Bad for data.**



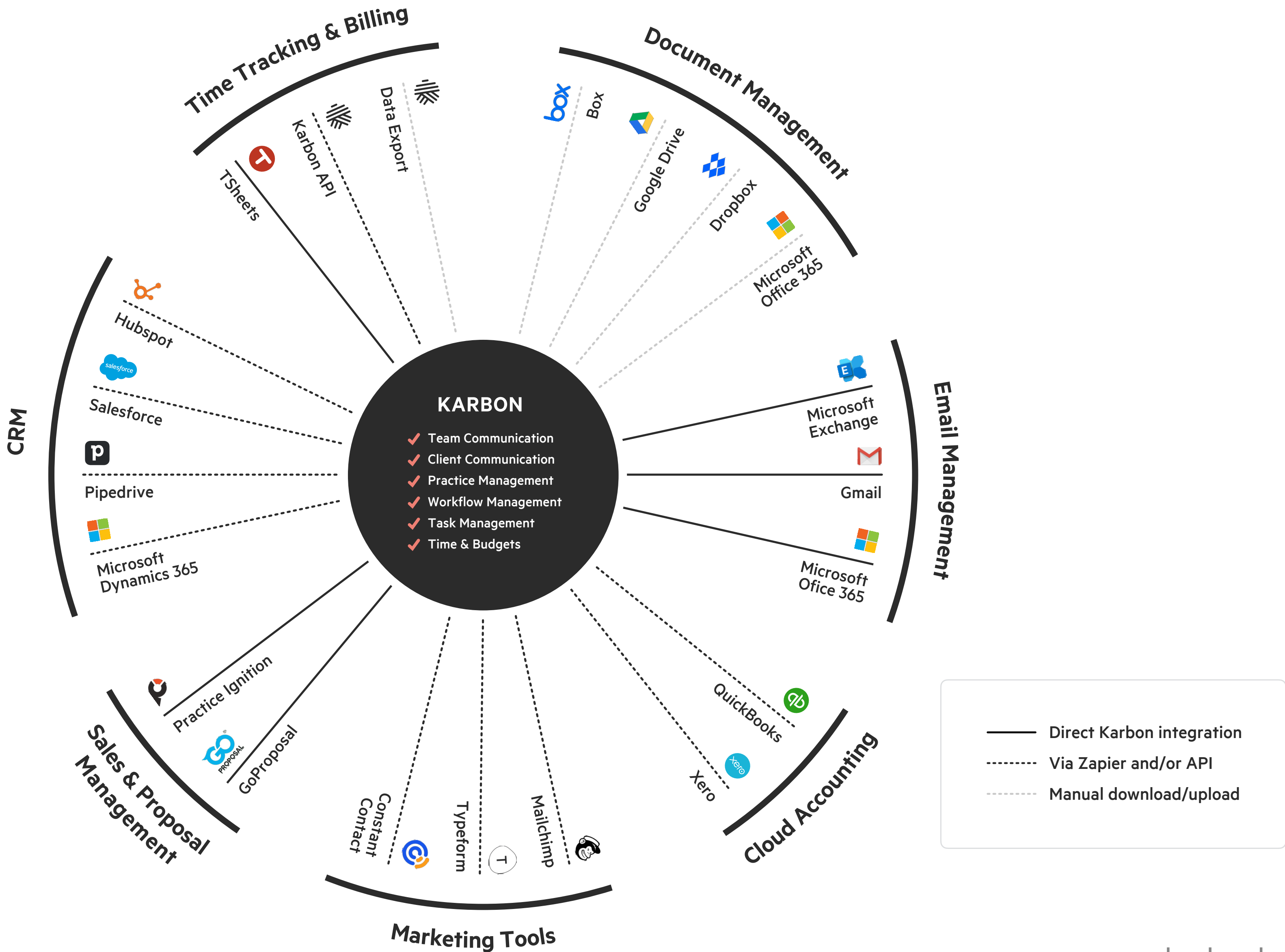
# Automating data entry and transport

- Native, in-product capabilities (e.g. contact profiles).
- Direct integrations (e.g. TSheets).
- Indirect integrations (e.g. Zapier).
- Do-it-yourself integrations (e.g. open API).





# How to build your tech stack around Karbon



*“Envolta stands for leveraging technology. We make use of the best systems and processes to eliminate data entering. This allows us to focus on customer service, the advisory role, and delivering the best experience to our clients.”*

— David DiNardo, Envolta, President & CEO



# The Envolta technology stack defined

- Email & Apps
- Practice Management
- CRM
- Document Management

**Foundational**





# The Envolta technology stack defined

- Email & Apps
- Practice Management
- CRM
- Document Management
- Accounting
- Payroll
- Tax
- Advisory

} **Service delivery**



# The Envolta technology stack defined

- Email & Apps
- Practice Management
- CRM
- Document Management
- Accounting
- Payroll
- Tax
- Advisory
- Pricing & Proposal
- Time tracking
- Integration
- Other

**Practice enablement**



# The Envolta technology stack

- **Email & Apps:** Gmail
- **Practice Management:** Karbon
- **CRM:** Pipedrive
- **Document Management:** Hubdoc
- **Accounting:** Intuit QuickBooks Online
- **Payroll:** WagePoint
- **Tax:** Intuit ProFile / ProTax
- **Advisory:** Fathom & Spotlight
- **Pricing & Proposal:** Practice Ignition
- **Time tracking:** Intuit TSheets
- **Integration:** Zapier
- **Other:** Slack, Zoom, Calendly, Plooto

 Suite

 KARBON

 pipedrive™

 intuit  
quickbooks.

 Wagepoint

 zapier

 PRACTICE Ignition

 TSHEETS  
by quickbooks



# Automating from sales to delivery

- Receive client inquiry (prospective client created)
- Complete discovery call & needs assessment
- Create and send a proposal
- Receive signed proposal (work created)
- Work assigned
- Systems setup
- Initial monthly accounting completed
- Work personalized, scheduled, assigned & automated
- Work delivered on-time & at quality



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**pipedrive™**



**PRACTICE Ignition**



 **KARBON**



 **intuit quickbooks®**



**Start small. Be focused.**  
**Build from there.**



# 9 steps to picking & choosing technology

- 1 Identify your biggest opportunities
- 2 Prioritize your infrastructure
- 3 Review & narrow the options for your top priorities
- 4 Evaluate the vendors
- 5 Decide what's most important
- 6 Assign a weighting
- 7 Score your options
- 8 Calculate your scores
- 9 Choose & use your winner

**Read:** Selecting the right technology for the modern accounting practice

<https://bit.ly/3iRRsbq>



# Designing an efficient firm





# Recap: Traits of growing, scalable practices

- Services are productized.
- Work is systematized.
- Relationships are personalized.



# Recap: Steps to automate

- Optimize your current processes.
- Pick your tech stack and partners.
- Automate the easy workflows (or tasks) first.
- Set your targets. Track results.
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- Repeat with a new workflow (or task).



# 10 steps to process improvement

- 1 Determine the process to optimize
- 2 Discuss the existing process as a team
- 3 Agree on what is success & the measure
- 4 Map out “As-Is” processes (& variants)
- 5 Discuss variants and why they exist
- 6 Review all steps for inefficiencies
- 7 Create a “To-Be” process with a subteam
- 8 Test the process (or at least the logic)
- 9 Document and implement broadly
- 10 Iterate and further optimize

**Read:** Reviewing and improving your process management

<https://bit.ly/2E5szKt>



# Workflow concepts (simple)

- **Ad-hoc** — Capture tasks as you go and promote to a work template.
- **Paste to generate** — Procedures laid out elsewhere? Copy & paste to create.
- **Supporting materials** — Add descriptions, attach files and insert URLs.
- **Hand-off (task)** — Write-out @ mentions in descriptions to ensure notifs.
- **Section** — Use sections for usability, ownership changes, and automation.
- **Build for capture** — Leverage task descriptions to capture notes.
- **Springboard** — Place URLs in the item title for click to get the work done.
- **Detailed descriptions** — Create less tasks by combining in descriptions.
- **Unassigned** — Leave sub-tasks unassigned to eliminate To-do fatigue.



# Workflow concepts (complex)

- **Hand-off (work)** — Explicitly spawn another process from an existing one.
- **Renaming (work)** — Move a prospect to a client to preserve a timeline.
- **Role reassign** — Assign & notify a colleague when resource is known (bulk).
- **Work reassign** — Move work ownership back and forth to notify & view.
- **Reviews** — Minimize the back & forth and collaborate on the review task.
- **Over-build** — Anticipate follow-up by pre-building client tasks.
- **Decisions** — Use sections (and delete) to create multiple paths in workflow.
- **Start Date** — Use start dates to hinge a process for purposes of recurring.
- **Duplicate** — For bundled services, build separate for each service & combine.



# Workflow concepts (automation)

- **Client tasks** — Task the client, remind them to complete, and collaborate.
- **Pull production** — Change start dates to pull work and due dates in.
- **Revert** — To reassign job roles based on additional found capacity.
- **Schedules** — Smart schedules to put recurring work on auto-pilot.
- **Work generation** — Go from proposal to engagement to work automatically.
- **Automators** — Change statuses globally and within task lists (triggered).
- **Import tasks** — Create workflow parts that can be copied into checklists.



# Work management automation

## Services:

- Work generation via integrations with Practice Ignition & GoProposal
- Suggested time entries
- Integrate with Time Tracking & Billing
- Client tasks
- Auto-document storage

## Work:

- Global Automators
- Tasklist automators
  - Statuses
  - Due dates
  - Assignees
- SOPs from pre-built, programmed templates
- Scheduled, recurring work

## Relationships:

- Client data sync
- Zap with MailChimp
- Contact social profiles
- Client auto-reminders
- Auto-email sharing
- Low priority inbox
- Activity timelines



# Work management automation

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### Add Automator

WHEN

All tasks in the section above this section



HAVE THE STATUS

Completed



CHANGE THE

Status



The work



TO

In Review



[Cancel](#)

Save





# Introducing Karbon

## Work Management Software *for* Accounting Firms

[karbonhq.com](https://karbonhq.com)

# Wrap up



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# Questions?

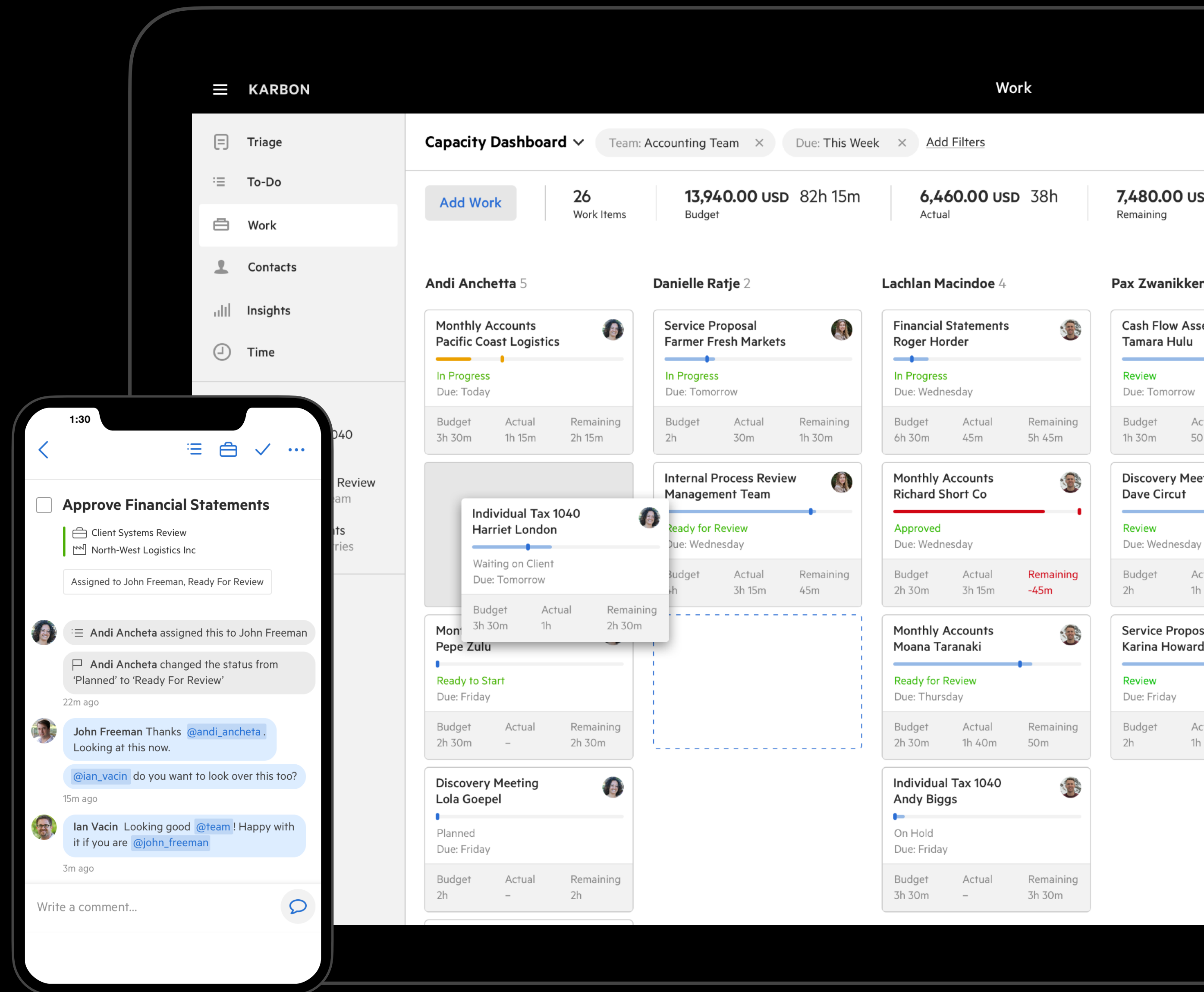




# Work Management Software for Accounting Firms

karbonhq.com

GET STARTED



# Thank you

Get started at [karbonhq.com](https://karbonhq.com)

Follow us on twitter [@KarbonHQ](https://twitter.com/KarbonHQ)

[ian@karbonhq.com](mailto:ian@karbonhq.com)





- 📄

Triage
- ☰

To-Do
- 📁

Work
- 👤

Contacts
- 📊

Insights
- 🕒

Time
- RECENTLY VIEWED
- 📁

Individual Tax 1040  
Tanya Franks
- 📁

Internal Process Review  
Management Team
- 📁

Monthly Accounts  
Xi Health Industries
- Bronwyn Fredrickson
- Help & Feedback
- Settings
- Logout

Assigned to Sara Goepel ▾ In Progress ▾ ⌚ Due Friday (4 Days) ⌚ 5 of 14 Tasks Completed (35%) ⌚ 4h 30m Budget Remaining

Timeline

Tasks

Time & Budget

Details

Collapse All Sections

CLIENT TASKS

Month-End Preparation – Sent to Abigail Silvers, Yesterday at 7am | ⌚ Gentle Reminders

Add Client Task

⋮

⚡ 2 Automators

✓

Ensure all Expenses are Entered

Completed

C

✓

Upload Account Documentation

Completed

C

💬 7 📄 3

👤 Pax Zwanikken

Thanks for uploading these Abigail. Looks like everything is going well.

✓

Update Employee Details

Completed

C

Bookkeeping

Add Task

⋮

⚡ 2 Automators

✓

Collect and Upload Statements

Completed

👤

☐

Ensure Bookkeeping is Complete

Ready to Start

Due Today

👤

☐

Follow-Up With Client on Any Missing Information Using Client Tasks

Ready to Start

Due Today

👤



### Add Automator

WHEN

All tasks in the section above this section



HAVE THE STATUS

Completed



CHANGE THE

Status



The work



TO

In Review



[Cancel](#)

Save



### Client Task Auto-Reminders



Automatically send [Gentle Reminders](#)

- ⌚ Reminder 7 days before task due-date
- ⌚ Reminder on task due-date
- ⌚ Daily reminder when overdue

Save



- Triage
- To-Do
- Work
- Contacts
- Insights
- Time

- RECENTLY VIEWED
- Individual Tax 1040  
Tanya Franks
  - Internal Process Review  
Management Team
  - Monthly Accounts  
Xi Health Industries

- Bronwyn Fredrickson
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Capacity Dashboard Team: Accounting Team Due: This Week Add Filters

Add Work	26 Work Items	13,940.00 USD Budget 82h 15m	6,460.00 USD Actual 38h	7,480.00 USD Remaining 44h 15m
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Andi Anchetta 5 Danielle Ratje 2 Lachlan Macindoe 4 Pax Zwanikken 3 Sara Goepel 4 Stuart M

Monthly Accounts Pacific Coast Logistics

In Progress Due: Today

Budget	Actual	Remaining
3h 30m	1h 15m	2h 15m

Service Proposal Farmer Fresh Markets

In Progress Due: Tomorrow

Budget	Actual	Remaining
2h	30m	1h 30m

Financial Statements Roger Horder

In Progress Due: Wednesday

Budget	Actual	Remaining
6h 30m	45m	5h 45m

Cash Flow Assessment Tamara Hulu

Review Due: Tomorrow

Budget	Actual	Remaining
1h 30m	50m	40m

OKR Coaching Prestige Worldwide

In Progress Due: Tomorrow

Budget	Actual	Remaining
4h	50m	3h 10m

Individual Tax 1040 Pamela

In Progress Due: Tomorrow

Budget	Actual	Remaining
4h 30m		

Internal Process Review Management Team

Ready for Review Due: Wednesday

Budget	Actual	Remaining
	3h 15m	45m

Monthly Accounts Richard Short Co

Approved Due: Wednesday

Budget	Actual	Remaining
2h 30m	3h 15m	-45m

Discovery Meeting Dave Circuit

Review Due: Wednesday

Budget	Actual	Remaining
2h	1h	1h

Hiring Process Tanya Franks Apparel

On Hold Due: Friday

Budget	Actual	Remaining
2h 30m	1h 10m	1h 20m

Individual Tax 1040 Marcus

On Hold Due: Friday

Budget	Actual	Remaining
2h 30m		

Monthly Accounts Harriet London

Waiting on Client Due: Tomorrow

Budget	Actual	Remaining
3h 30m	1h	2h 30m

Monthly Accounts Moana Taranaki

Ready for Review Due: Thursday

Budget	Actual	Remaining
2h 30m	1h 40m	50m

Service Proposal Karina Howard

Review Due: Friday

Budget	Actual	Remaining
2h	1h 20m	40m

Individual Tax 1040 Elanore Rudd

Ready to E-File Due: Friday

Budget	Actual	Remaining
4h 30m	3h 15m	1h 15m

Individual Tax 1040 Xi Chan

Ready to E-File Due: Friday

Budget	Actual	Remaining
4h 30m		

Discovery Meeting Lola Goepel

Planned Due: Friday

Budget	Actual	Remaining
2h	-	2h

Individual Tax 1040 Andy Biggs

On Hold Due: Friday

Budget	Actual	Remaining
3h 30m	-	3h 30m

Individual Tax 1040 George Jamison

Preparing Due: Friday

Budget	Actual	Remaining
4h 30m	-	4h 30m

Individual Tax 1040 Neo Kir

Ready to E-File Due: Friday

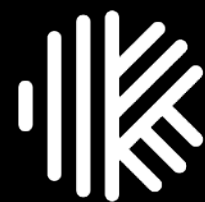
Budget	Actual	Remaining
4h 30m		

OKRs Q3 Management Team

Budget	Actual	Remaining

Individual Tax 1040 Arthur

Budget	Actual	Remaining
4h 30m		





KARBON

Triage

Triage 2

Low Priority

Draft

Sent

Cleared

To-Do

Work

Contacts

Insights

Time

RECENTLY VIEWED

Individual Tax 1040

Tanya Franks

Internal Process Review

Management Team

Monthly Accounts

Xi Health Industries

Bronwyn Fredrickson

Help & Feedback

Settings

Logout

All – 7

1 – 7 of 7

<

>

Today

Clear Today

Jackie, Samual, Rashid

Letter of Engagement for Tax Services

Email

Assigned to You

Corporate Tax 1120

Reach Foundation

3

6

1

1 new email

3 new comments & mention of you

Scott Gerdzunas

E-File Tax Return with Agencies

Task

Assigned to Scott Gerdzunas

Individual Tax 1040

Elliot Shehaan

1

Pax Zwanikken @Bronwyn can you jump on a Zoom call and show @Scott how to lodge the amendment? Thanks.

Danielle Rathje

Capacity Plan

Note

Tax Season Planning

Internal

2

Danielle Rathje @ian and @bronwyn the templates you set up for all this work are great! This automation will make a huge difference.

Richard, Chiang-Lee, ...

Confirming our Discovery Meeting

Email

Assigned to Richard Snell

Client Onboarding

North-West Logistics

4

4

1

3 new emails

This Week

Clear This Week

Ian Vacin

Share Project Plan with Senior Team

Task

Assigned to Lachlan Machindoe

Monthly Management Meeting

Internal

14

2

Lachlan Machindoe I made the changes you requested @Ian. I think it has come together well and the rest of the team are good to start o...

Sara Goepel

Tax Due-Dates Delayed

Note

Tax Season Planning

Internal

2

Yohan Siemen Let me know if I can help with this at all. I should have some time tomorrow if you need me.

Christina, Stuart, Maia

Monthly Account Files

Email

Assigned to You

Monthly Accounts

Reach Foundation

3

1

Hi Bronwyn, I've attached the last of the account statements and have completed the tasklist you sent me. Please let me know if you need anything else...



KARBON

Triage

Triage 2

Low Priority

Draft

Sent

Cleared

To-Do

Work

Contacts

Insights

Time

RECENTLY VIEWED

Individual Tax 1040

Tanya Franks

Internal Process Review

Management Team

Monthly Accounts

Xi Health Industries

Bronwyn Fredrickson

Help & Feedback

Settings

Logout

All – 8

1 – 8 of 8

Today

Clear Today

Jackie, Samual, Rashid

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Assigned to You

Corporate Tax 1120

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E-File Tax Return with Agencies

Task

Assigned to Scott Gerzunas

Individual Tax 1040

Elliot Shehaan

1

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Director Appointment

Add to Work

Jackie Simpson

Jackie Simpson → Andi Ancheta

Today 9:42am

Hi Andi,

I've just been appointed Director of Reach Foundation.

Can you please:

1. Send me the appropriate forms.

2. Update your records with my new home address – 7 Riversdale Quay.

3. Update my primary email address to [jackie@reachfoundation.com](mailto:jackie@reachfoundation.com)

See attached and let me know if you have any questions or need anything else from me.

Thanks,  
Jackie.

Directors Appointment.pdf

Bronwyn Fredrickson

I can help you out with this if you need. @sara and I proceesed last year's filings for Reach Foundation so already have a good relationship with the management team there.

Andi Ancheta

Yes please @bronwyn, can you respond to Jackie now and let her know you are taking care of it? Thanks.

Andi Ancheta

assigned this to Bronwyn Fredrickson

ASSIGNED TO

Sara Goepel

TO-DO DATE

Today

DUE

Tomorrow

STATUS

In Progress

NOTIFY ME

New Emails & Comments