



The secrets of efficient and effective team collaboration

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Meet your hosts



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Agenda and learning objectives

Category	Description
Roles & responsibilities	Review the organizational structure of firms and the perspective of each player.
Communication	Learn the techniques to foster effective team communication.
Collaboration	Explore proven methods to maximize the benefits of team collaboration.
In Practice	See firsthand how to implement the theory into practice to get results.



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



**“Understand nothing in your
practice should be done in a silo.”**

— Steph Hinds, Growthwise, Head Ninja



The opportunity



Challenges of team collaboration

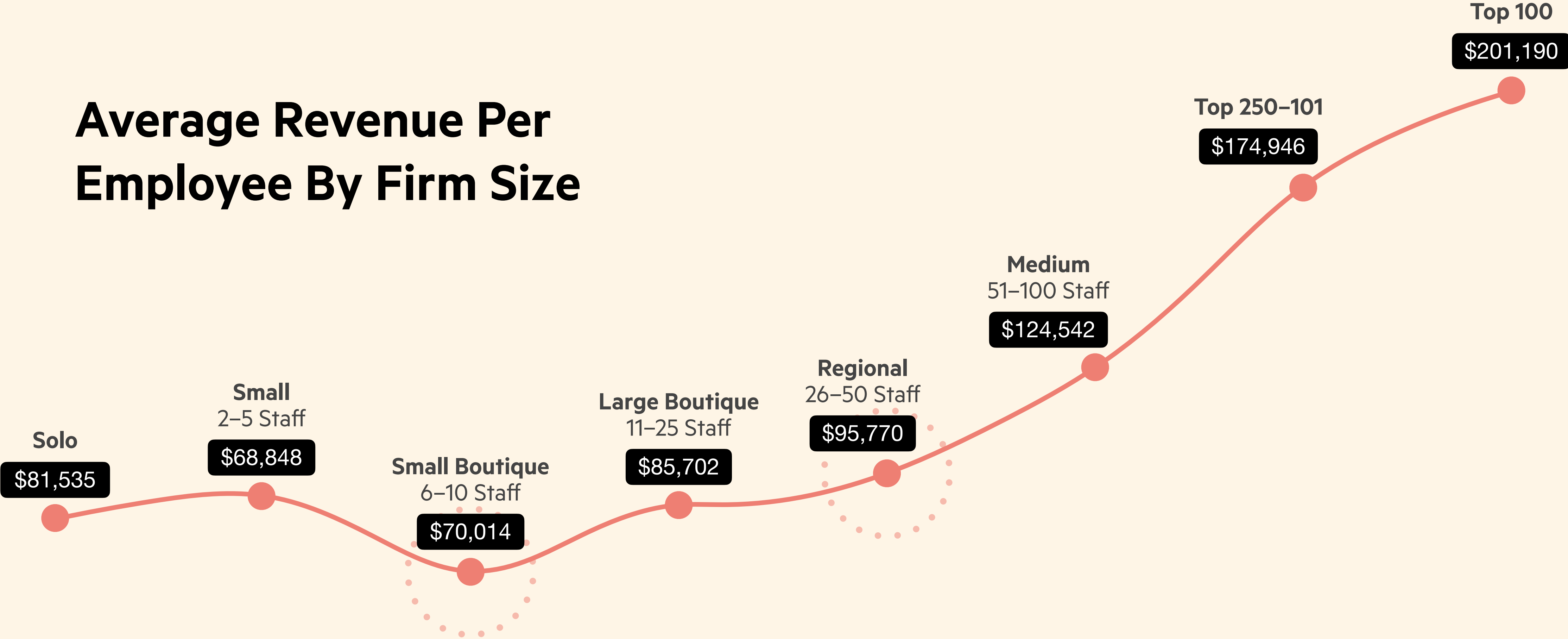
Factors	Impacting
<ul style="list-style-type: none">• Lag time• Passing the baton• Rework• Context• Ownership	<ul style="list-style-type: none">• Efficiency• Visibility• Quality• Client Service• Profitability



**At a minimum, 4 hours per week
per employee is lost.**



Average Revenue Per Employee By Firm Size



Roles & responsibilities

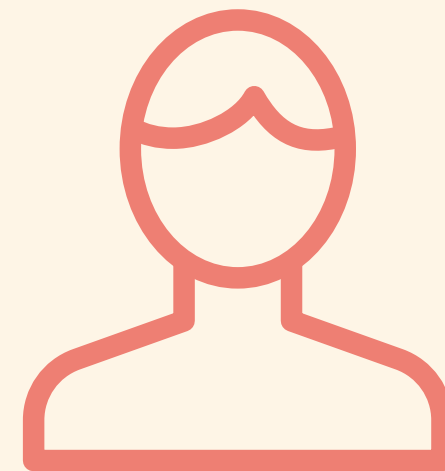


The key components of teams

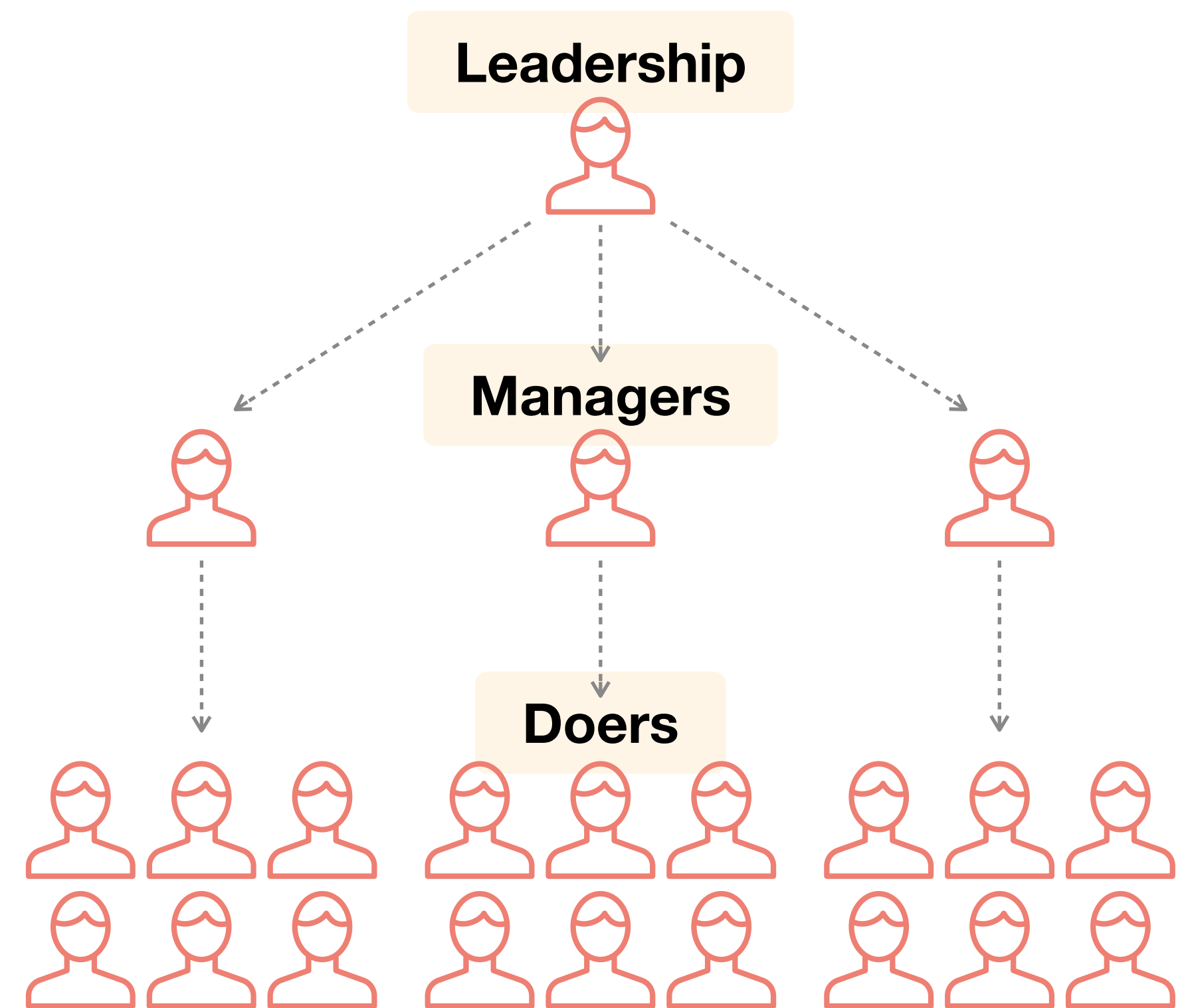
Foundations	Communication
<ul style="list-style-type: none">• Roles• Alignment• Transparency• Trust	<ul style="list-style-type: none">• Ownership• Structure• Cadence



Organization design



1:6



Roles & responsibilities

Key questions each role should be asking

	Doers	Managers	Leadership
First thing	What has changed since I last checked my projects/clients?	What has changed across the team since I last checked?	What is happening across the practice?
Urgency	Any urgent issues with my clients?	Are we on-track to hit our deadlines and meet our goals?	Are our clients happy?
Prioritization	What are my priorities? Have they shifted?	Are we servicing our clients? Are our processes sufficient?	Do we have the resources and tools we need to be successful?
Projects	Are my projects coming along as expected?	How do we do things more efficiently as a team?	How do we drive more business from new or existing clients?
Looking ahead	Will I meet my deadlines? On-time? At quality?	What cross-sell or up-sell opportunities exist?	Are we profitable? What should we change or double down on?
Vantage point	My	Our	Us



Team communication



Communication vs. collaboration

Category	Communication	Collaboration
<ul style="list-style-type: none">• Type• Purpose• Response time• Response length• Technology	<ul style="list-style-type: none">• Synchronous• Quick answers• Immediately• Short• Slack, Teams	<ul style="list-style-type: none">• Asynchronous• Getting work done• Within hours/days• In-depth• Karbon

Check out the 10 Slack agreements for Buffer: <https://bit.ly/2Y0nkBR>



Tips and tricks of Slack & Teams

- **Set the rules:** The why, what and how of Slack/Teams.
- **Team sport:** Everyone needs to participate — especially partners.
- **Be smart:** Create logical channels and @ mention as appropriate.
- **Manage the settings:** Disable notifications, mute channels (for those you don't need), mute sound.
- **Over communicate:** Never assume a colleague has read/agree to anything as part of a chat. Document & communicate decisions.



The communication loop

- **@ mention:** Need an answer? Be sure to address the person.
- **Ask again:** Haven't received an answer? Don't assume and, rather, ask them again.
- **Use a phone:** Do you need (or are having) a long conversation. Pick up the phone or meet in person to resolve.
- **Close the loop:** Like offline, online communications require a yes, no, or nod in agreement. Use an emoji or make a comment.



The how of delegation

- **Trust:** Delegate with risk of failure.
- **Clarity & alignment:** Clear goals, objectives, team, and timing.
- **Ownership:** Who's who in the zoo (DACI).
- **Cadence:** Rhyme and reason of meetings with visible scoreboard.
- **Communication:** Constant and constructive. Use a tech tool.
- **Support:** Outline who is available and how they can help.
- ***Secrets of Teams? Communicate, communicate, communicate.***



Team collaboration



Always be documenting (ABD)

- **Driven process:** Tops-down & bottoms-up — the team has to want to create the mantra.
- **Patience pays:** Expect some time for the fruits of your labor to become apparent. Stay the course.
- **Always improve:** Ask yourself daily: “What process did I follow today that needs updating?” Then take action.
- **Lead by example:** Partners need to show, encourage, and remind team members to always be documenting.



Project learning and sharing

- **Before:** Cognizant of team member strengths (StrengthFinders) and clarity on the objective, goal, team and timeframe.
- **Launch:** Clear ownership & responsibilities (DACI) to engage team members and subject matter experts.
- **During:** Team collaboration and communication via tools (ABD).
- **Post:** Retrospectives (or after action reviews). Document and communicate across the practice.



Tips and tricks of collaboration

- **Reflection:** Create a team collaboration reflection checklist to improve in the moment and post projects.
- **Learning channel:** our team communication tool should have one and be the most populated. Write what you are learning.
- **Document everything:** Lead by example and always have a window open in your practice management to capture.
- **Transparency:** Two way street — tops-down and bottoms-up.



**“Only the guy who isn’t rowing
has time to rock the boat.”**

— Jean-Paul Sartre, French philosopher, playwright and novelist



In practice



Technology across a practice

Client facing

Practice facing

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



Karbon concepts

- **Always be documenting**
- **Keep colleagues in the loop**
- **Team communication**
- **Team work**
- **Obfuscate & assign colleagues**
- **Retrospectives**



☰ Andi Ancheta assigned this to Tim Donohoue

📄 Andi Ancheta changed the status from 'Planned' to 'Ready For Review'

22m ago



Tim Donohoue Thanks [@andi_ancheta](#).
Looking at this now.

[@ian_vacin](#) do you want to look over this too?

15m ago



Ian Vacin Looking good [@team](#)! Happy with it if you are [@tim_donohoue](#)

3m ago



Karbon concepts

- **Always be documenting:** Search name on contact, then add notes to timelines or comment on emails & tasks. Flag others with @ mentions.
- **Keep colleagues in the loop:** Flag others with @ mentions (using their handles). Close the loop with thumbs up on comments.
- **Team communication:** Add teams (with handles); @ mention the team like you would with email groups in comments & notes.
- **Team work:** Use teams to view collective work on the Kanban board.
- **Obfuscate & assign colleagues:** Use job roles in work templates and assign colleagues as needed to delegate or get assistance.
- **Retrospectives:** Add a retrospective section to all checklists and promote a new process to a draft template when appropriate.



Wrap up



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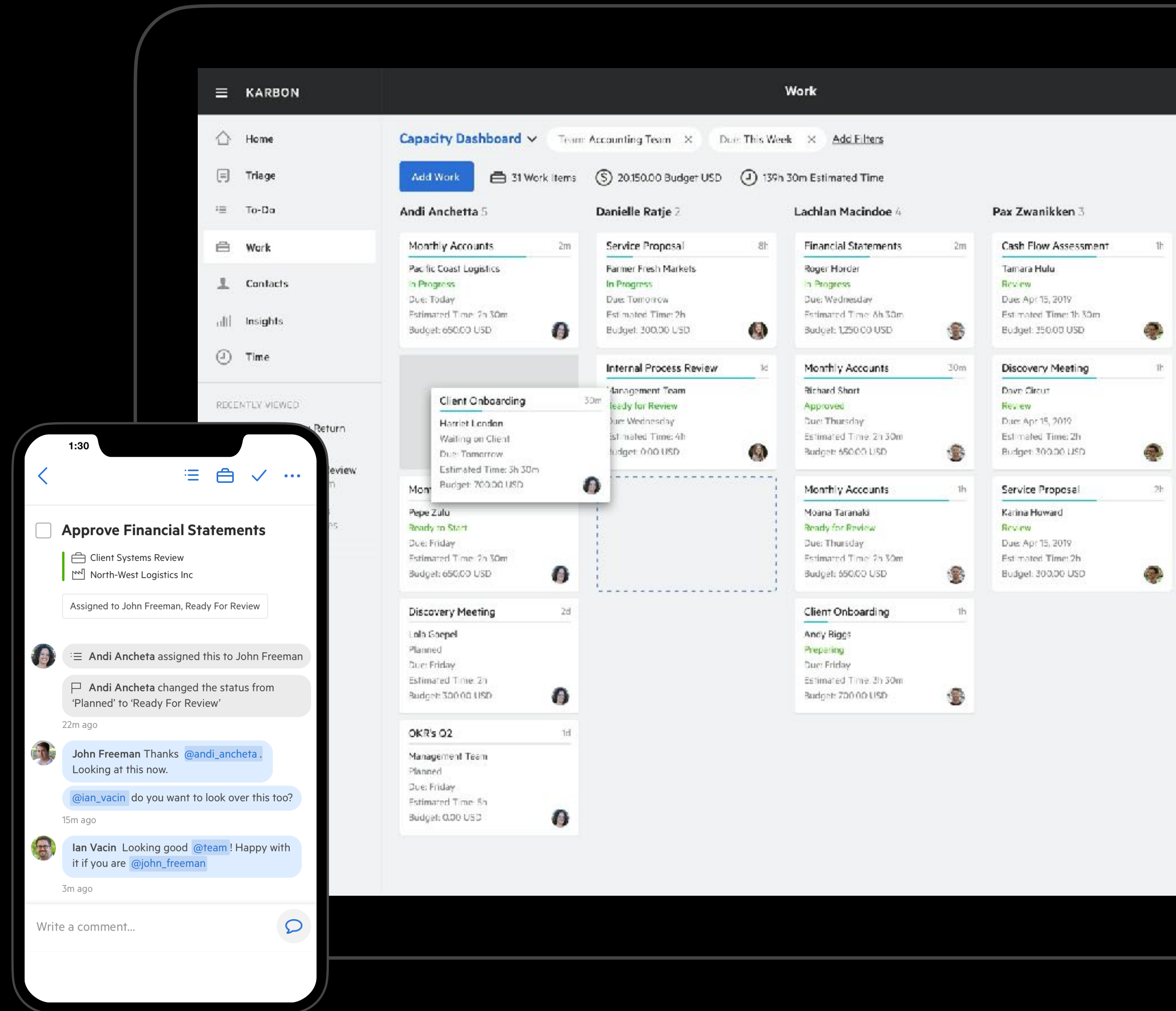




Work Management Software *for* Accounting Firms

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GET STARTED



Questions



Thank you

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