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# Leveraging Technology to Meet your Firm's Goals

**White Paper**

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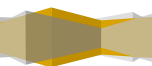


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## INTRODUCTION

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### HIRED GUNS

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Having a long term manageable business strategy is the key to success for businesses in both good and taxing times. Being able to run your staff as efficiently and effectively as possible will determine whether or not your firm can reach peak performance. Firms that utilize methods to optimize client service, internal management, and employees will even in challenging times succeed. In order for your firm to flourish you need to commit to making your staff highly engaged and productive. This includes: hiring the right people, developing their strengths, and supporting their ability to work collaboratively while increasing their knowledge base.

### THE CLIENT

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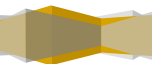
Identifying the right clients, and subsequently understanding their needs is critical to them best to ensuring long-term, mutually worthwhile relationships. Successful firms are drilling deeper into areas of specialization, centrally managing client data and enabling clients

to have anytime access to information and service. Leveraging technology to optimize client service by centrally managing their data and enabling clients to have anytime access to information and related service are critical.

### VIRTUAL WORK ENVIRONMENT

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Thriving businesses today have made it a priority to enable a more collaborative, virtual work environment for both employees and clients, enabling personnel to concentrate on the services clients treasure most. The means in which companies are accomplishing this involve employing a paperless environment; centralizing client information; making sure staff and clients have anytime/anywhere access to the resources they necessitate; promoting mobile work and service environments; and gradually embracing a Software as a Service (SaaS) plan as a vital part of their technology environment.



## IT'S THE PLAYERS THAT WIN THE GAME, NOT THE COACHES

The only way to run your business effectively is to hire and retain knowledge workers. You want your key personnel to have the right tools to get the job done. This includes a centralized database of client information, technology to support paperless processes, and integrated industry specific software. A company's unparalleled expertise, skills and experience are what set it apart from the competition. All businesses need to ensure employees that they have access to the information that they need. Move to a solution that makes it easier to find and use information. This allows employees to make more knowledgeable business decisions, prevent work idleness, and trim down project cycle periods.

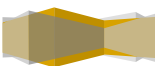
### WORK FROM HOME

Within any professional practice there is an enormous pressure who can deliver customized services at high speeds, coupled with the ability to perform their job at any time or place." High performing firms are putting in place the knowledge tools, mobile technologies and applications to thrive in this environment. Addressing your clients' needs means ensuring that employees have the resources they need to do their job,

regardless of their location. Oftentimes, this could be at a client's location as firms continue to become a more significant collaborator to their clients. Firms are increasingly recognizing the magnitude of work/life balance. In an effort to recruit and retain the best and brightest, supporting full-time remote workers from their home office is ideal. Highly effective firms should position themselves to best aid mobile workers.

### UTILIZATION OF MOBILE DEVICES

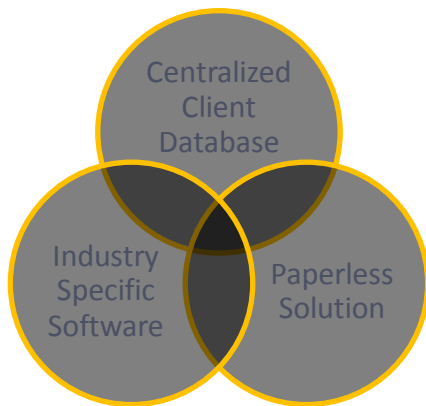
Thriving businesses are also more prone to possess resources to ensure that their staff has what they need to do their jobs. Profitable businesses have been early to incorporate BlackBerries, iPhones, wireless laptops and 3G netbooks to name a few. There will be an increase in the number of professional staff that decides to work remotely over the next couple of years; the utilization of these devices can help optimize remote staff. Organizations should be putting these solutions in place to support their workers, thus giving themselves a competitive advantage. Improve the service you can deliver to clients, and allow your staff to benefit from a flexible work environment. A mobile workforce would improve work/life balance, attract and retain employees, and improve staff morale.



## IMPROVING CLIENT SERVICE

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Providing value-added services to clients is only possible if your firm has the technology and information they need to do so. Facilitating anytime, anywhere client communications through technology is crucial for client service optimization. Below is a chart summarizing the top technologies being applied:

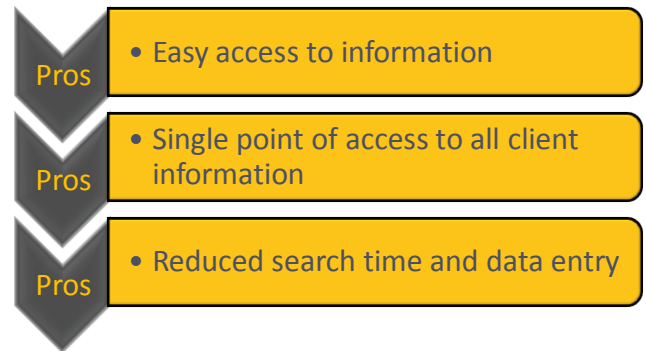


### CLIENT DATABASE

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Providing precise, streamlined client information is critical for any firm. This entails firms having a clear understanding of their customers; the simplest way to do this is to have all the information about your clients in a common database. Some benefits

include:

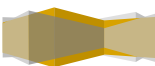


Be aware that having a centralized database is just the first stage. The second step would be using the integrated workflow tools and applications that support a common client database. With these applications, data entered in one place repeatedly updates across multiple applications. This leads to a gain in productivity and higher levels of accuracy and data consistency.

### ASSESSING CLIENT VALUE

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Identifying the value each client brings to the firm is key to managing your practice. Make use of a system that tracks resources assigned to clients so that the firm can more accurately measure profitability. High performing firms also look at growth potential and client retention strategies; with the right tools, the firm should be able to measure value from different outlooks.



## CONCLUSION

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With the right tools your firm can strategically focus on improving client services, staff relations, and firm management to achieve your goals. Every organization, whether big or petite, new or established, has the capacity to meet their performance demands.

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