

# How Accountants Streamline Communication to Find a Little Relief During Tax Season



By **BECKY LAWLOR** - Contributor

When peak tax season hits, the work/no-life balance marathon begins for accountants. As they try to complete their standard daily tasks while squeezing in all of their clients' tax filings, working late nights and weekends becomes the norm. But what if this busy season was different?



With artificial intelligence, mobility, and cloud technology, today's accountants streamline communication and improve customer care.

Accounting firms that streamline communication and use emerging technologies are seeing unprecedented time savings and increased productivity during the busy season. An even bigger benefit, however, is the increased satisfaction of clients and the ability to use the extra time to make the shift from number cruncher to trusted adviser.

Here's a look at how artificial intelligence, mobility, and cloud solutions help relieve busy accountants during peak season.



## Top BYOD Trends & Best Practices

BYOD is another key benefit of unified communications.

## AI Automates Routine Tasks

One way accountants are beating the busy season this year is by using artificial intelligence (AI) to automate tasks such as entering data, generating invoices, and creating electronic documents. By doing so, AI is handing accountants back significant time and operational savings.

For example, instead of having to manually create customized revenue reports for clients, accounting firms can tap into an AI-powered system to execute all the associated steps. By collecting, housing, and sorting through large data sets of financial information, AI makes it easier for enterprise firms to access the right data at the right time.

For small or mid-sized firms, AI can import data from a client's spreadsheet or accounting software, find the relevant information, make the necessary calculations, and create a visually engaging chart in a fraction of the time it would take a human to accomplish those tasks. Eliminating these routine tasks frees up more time for other work — like those pesky tax filings you've been doing on the weekends and weeknights.

## Mobile Technology Streamlines Communication

In the fast-paced tax season, mobility is crucial for accountants who need to be everywhere at once. Many of today's professionals are using mobile cloud-based business communication technology for accountants to help streamline communication and increase productivity.

With mobile technology, accountants can have real-time, seamless communication with colleagues and clients no matter where they are or what device they're using. And following BYOD best practices, accountants can use their own devices and easily transfer to business phones if needed, further increasing productivity and flexibility.

Cloud-based phone systems offer several features that help streamline communication. Having the ability to send transcribed messages directly to your email, for example, allows you to respond quickly to clients and colleagues. Having a virtual receptionist makes it easy to route calls to any extension and set different rules for weekdays, weekends, or even lunchtime.

When combined with video conferencing, mobile technology can also save clients the hassle of having to travel to meet with their accountant, as presentations and file sharing can be done from mobile devices.

With these types of communication tools, everyone can work the way that is most productive for them, while still maintaining a high level of responsiveness to clients and colleagues.

*With the right tools, you can become a trusted adviser to your clients, adding more value while working less.*

## Technology Strengthens Client Relationships

Clients are also happier when their accounting firms turn to cloud and mobile technologies. Younger clients, who are used to handling almost everything digitally, are especially turning to firms with these capabilities.

A Bill.com survey reported that younger business owners prefer to use accounting firms that utilize modern technology like cloud-based and mobile technologies. The millennial business owners surveyed indicated that these technologies weren't just nice add-ons for their accounting firm to have, but were critically important.

Younger business owners also felt it was important that firms respond to client communications in a timely fashion. Cloud and mobile technologies make this much easier to do. By enabling real-time communication, these technologies let firms have unprecedented connectivity between their employees and clients. Accountants can address client questions and concerns even when they aren't in the office, and as the survey shows, responsiveness to clients' needs is an important aspect of deepening the client-accountant relationship.

## Less Tactical Work, More Strategic Value

Business communication technology, AI, and software automation aren't just strengthening communication and automating time-consuming tasks. They are also allowing accountants to work more strategically.

As Tanya Titman FCPA, founder and managing director of Consolid8, noted in InTheBlack, "Millennials are looking for accountants who not only use technology but can recommend solutions." These solutions come from strategic insights that open-minded and tech-savvy accountants can provide.

As you head into the 2019 tax season, the more you can put business communication technology and other tools to work for you, the smarter — not harder — you can work. With the right tools, you can become a trusted adviser to your clients, adding more value while working less. You may even make it home in time to see the sun set before April 15.