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Managing a
Remote
Accounting
Workforce

**Winners,
Losers,
& How to
Succeed**





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Today you will **learn:**

- What aspects of remote work are remaining and what will change
- What experiences will win and lose in the hybrid workplace
- How firms can manage these realities for the best possible client and team experiences
- What you need to do for maximum career satisfaction and growth

Innovation that may have only happened in the largest firms **became a requirement for every firm.**

What would have taken years to achieve was accomplished within days or even hours.





**Client & Employee
Satisfaction**



Assignment Flexibility



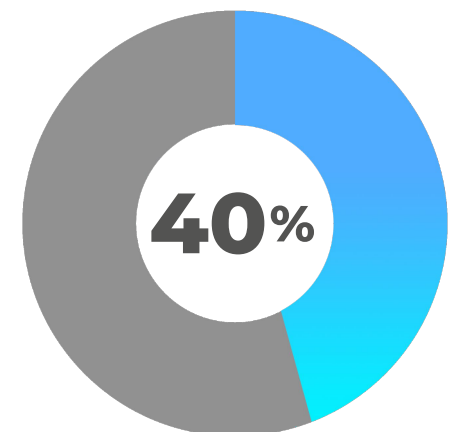
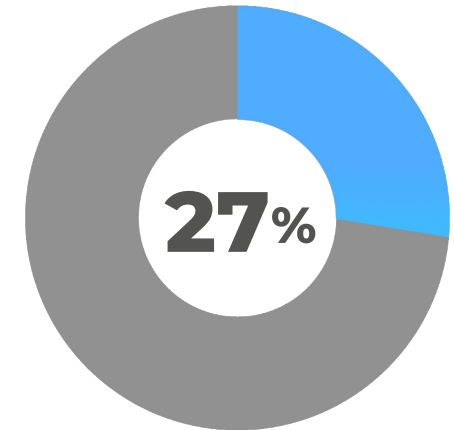
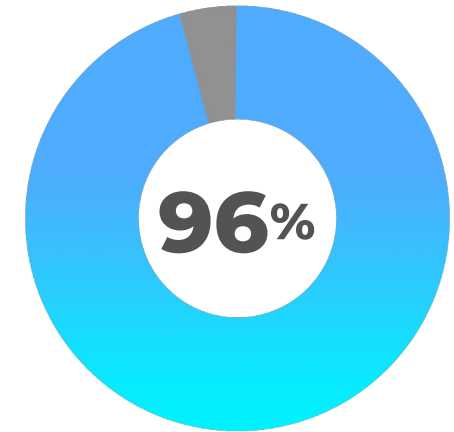
**Optimized Locations
& Workspaces**

According to a recent FlexJobs survey

65% of respondents report wanting to be full-time remote employees post-pandemic, and 31% want a hybrid remote work environment—that's **96% who desire some form of remote work.**

27% of workers say that the ability to work from home is so important to them that they are willing to take a 10% to 20% pay cut to work remotely.

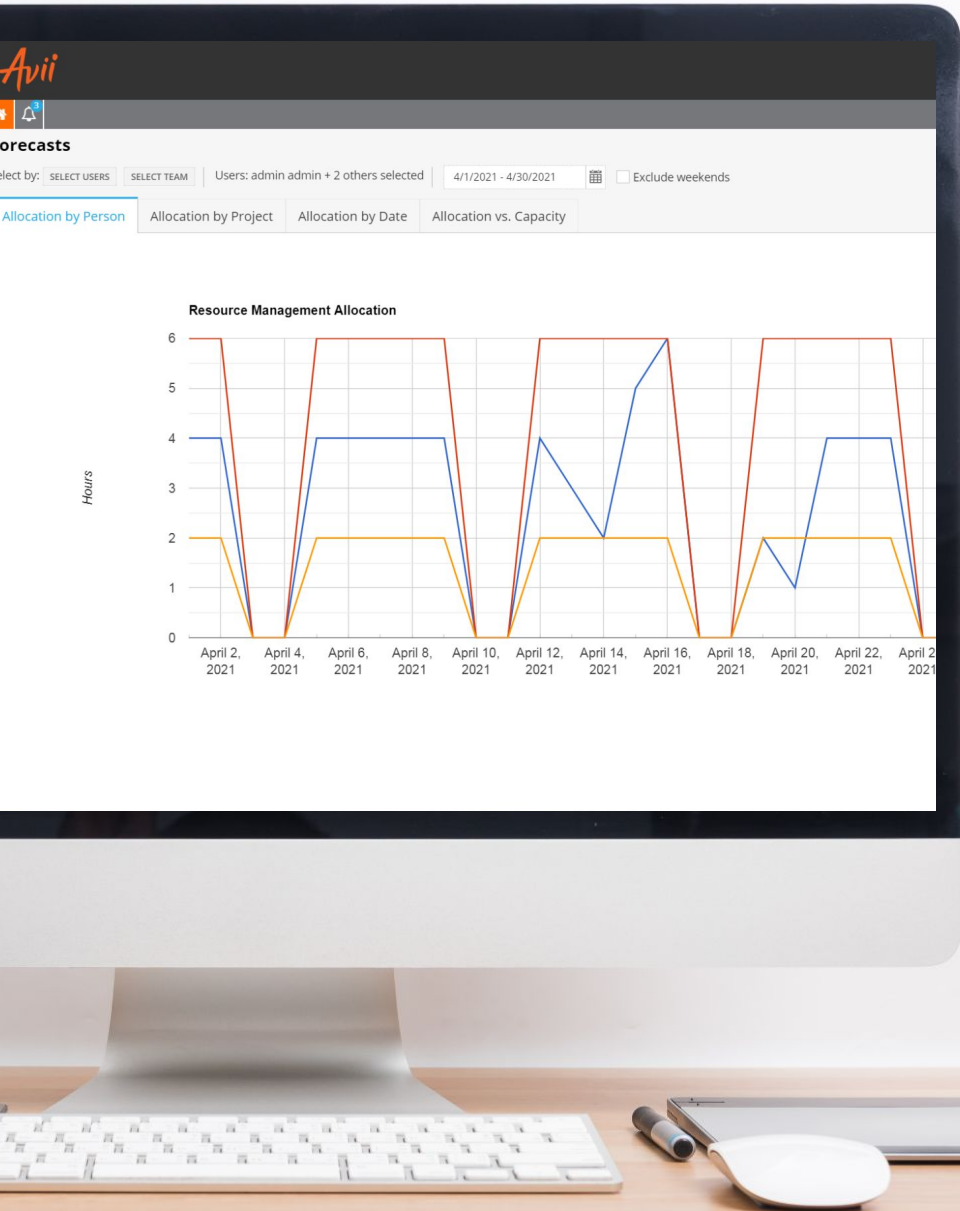
Research shows that businesses lose \$600 billion a year to workplace distractions, and that remote workers are **up to 40% more productive than their in-office counterparts.**





Poll #1

To what extent will your firm be **onsite**
versus remote by Jan 1, 2022?



IMA research, as reported by **Accounting Today...**

- Before the pandemic, organizations placed a low priority on technology-based financial reporting resources
- Nearly 2/3 reported time management issues during the pandemic, which prioritized their interest in cloud-based collaboration systems
- 1 in 4 expect an increase in budget for cloud-based technology solutions in 2021



Poll #2

To what extent will **your clients** prefer in-person meetings versus remote as of Jan 1, 2022?

By and large, financial reporting teams felt they had adequate tools to get the job done during the pandemic.

But what we wanted to know is this going to change your movement toward adoption of more elegant and efficient solutions?

And what we found is that there is an appetite for more.

- **Shari Littan**

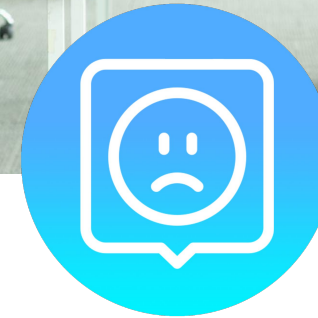
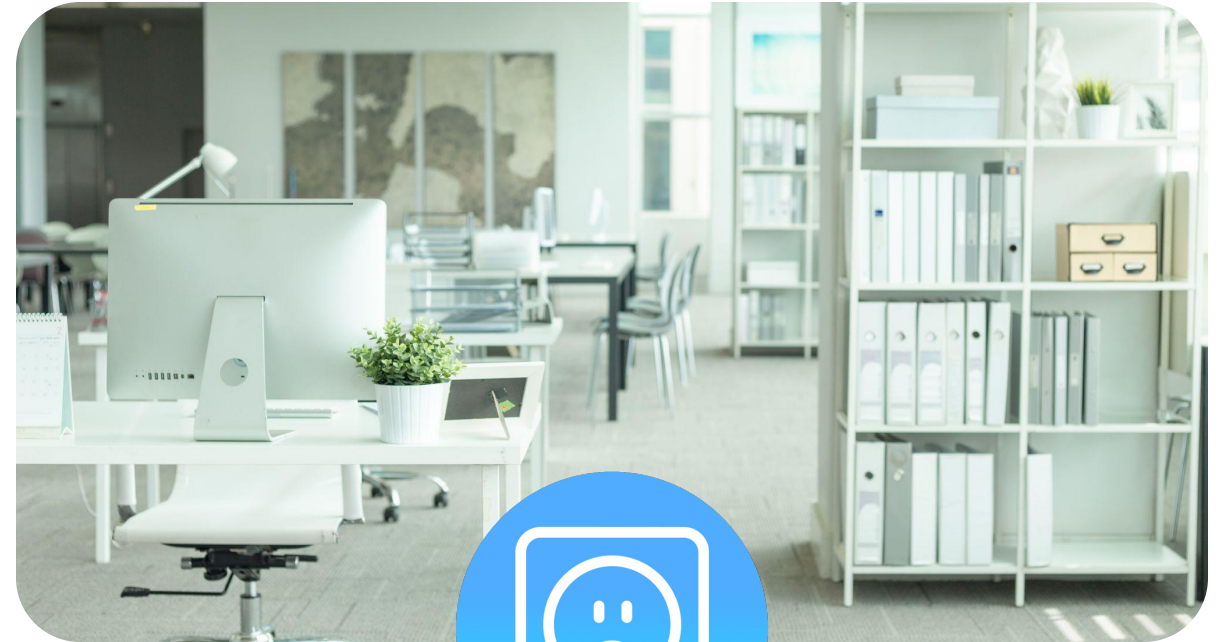
Director of Corporate Reporting Research and Policy
Institute of Management Accountants

Winners and Losers of Remote Work



Winners

Video Conferencing
Process Improvement & Workflow
Collaboration Software & Platforms
BYOD (Bring Your Own Device)
The Cloud



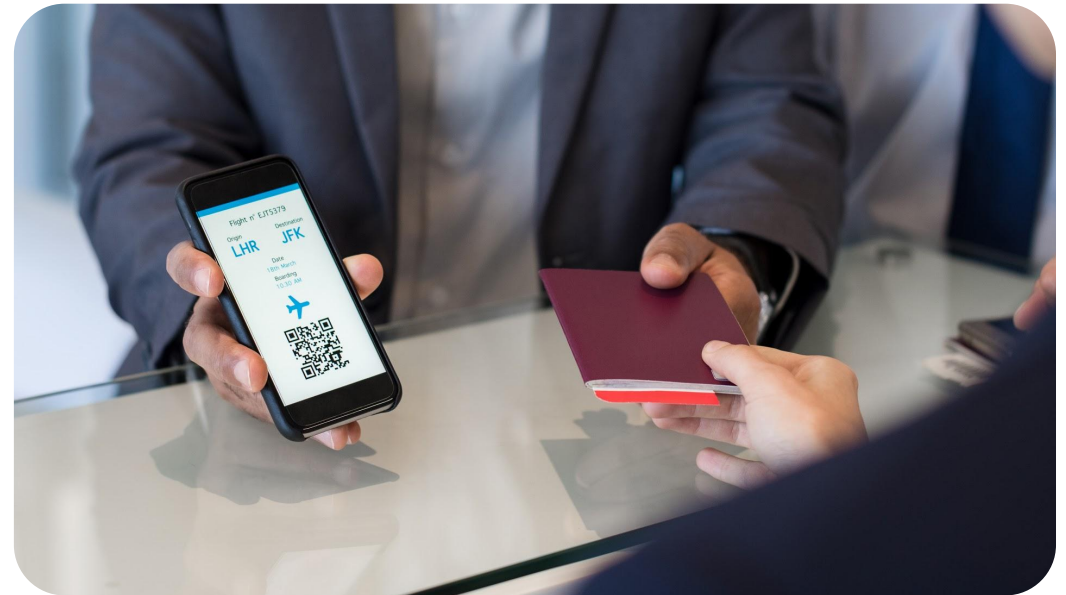
Losers

Conference Rooms
Native Hardware Infrastructure
Legacy Scheduling Tools
Traditional Office Space
Ad Hoc Brainstorming



Poll #3

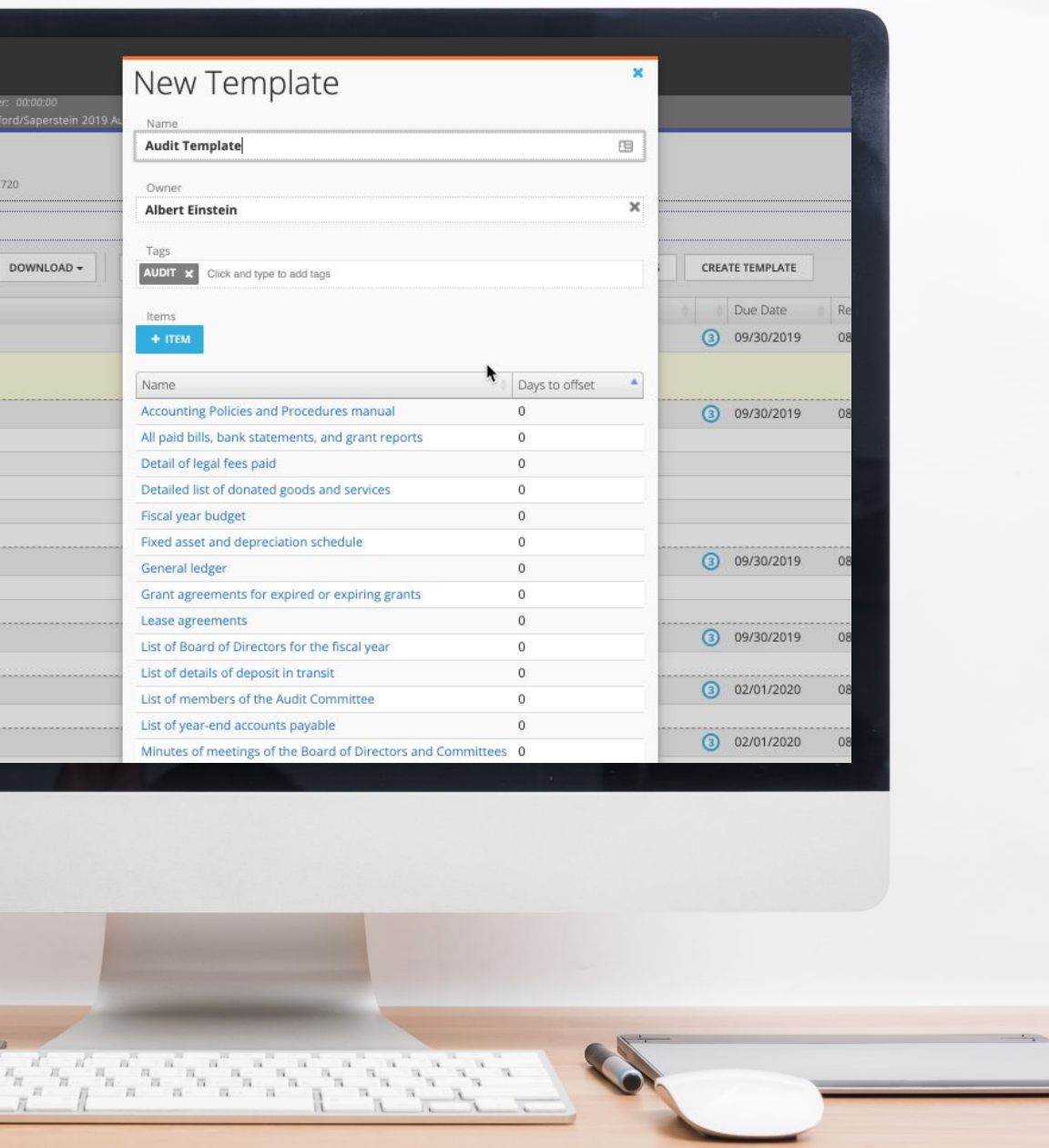
To what extent did your clients use a **cloud portal** during the 2021 tax season?



How to Navigate the New Environment



- **Unified Client/Team Portal**
 - All interactions and exchanges
- **Evolved Communication**
 - KPIs, dashboards and alerts with timely, content-rich human responses
- **Face-to-Face Collaboration**
 - Align teams and schedules so that some time is allocated for teams and clients to regularly work together (on-site or virtual)
- **Time & Location Concerns**
 - Wise use of technology and culture
- **Security Protocols**
 - Working from “anywhere” and “any device” means information can be stored locally or viewed by the wrong person



Career Considerations for **Firms & Practitioners**

Here are a few things managers and teams can do to ensure the evolution to hybrid working environments is smooth and successful:

- Set the scene
- Lead the way
- Take baby steps
- Share positive examples
- Be a watchdog

The various roles that **technology** plays in the hybrid workspace

- **Client experience**

- One stop
- Easy-to-use
- Secure

- **Team member experience**

- Job satisfaction
- Do more work in less time
- Focus on more important contribution

- **Management experience**

- Live KPIs/Dashboard
- Increased workforce diversity
- Increase security
- Increase profitability
- Increased employee loyalty
- Stay relevant & ahead of competitors



Poll #4

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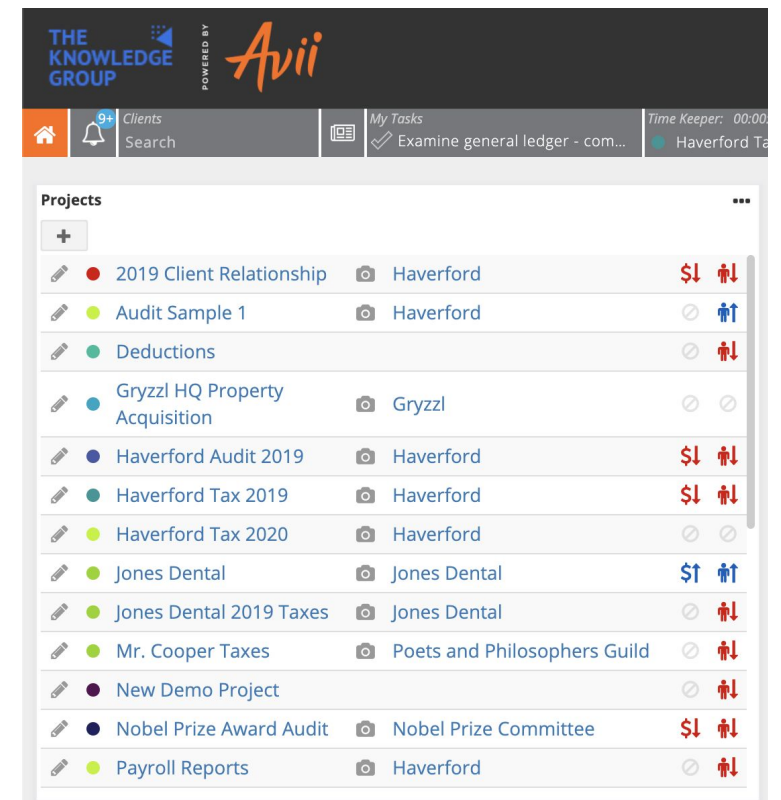
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