

YOU ALREADY USE AUTOMATION

BUT ARE YOU GETTING THE MOST
VALUE FROM IT?

A QUICK GUIDE FOR MAXIMIZING ROI



This may come as a hard truth for those who fear change, but there's **no escaping automation**. We come in contact with some element of automation from the moment we wake up—it's in our smartphones, computers, cars, TV, behind the scenes of your bank account, and in too many other places to list out! So even if you've decided to live a profoundly analog life, there's little chance of escaping some degree of automation.

Knowingly or not, everyone, including your employees, uses automation. The real shocker is the amount of accounting-specific tools that are now available to CPAs. In this article, we'll explore how automation is impacting a CPA's day-to-day life—and why that's not such a bad thing.

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WHEN DID AUTOMATION START, AND HOW DID IT GET HERE?

Just to back it up a bit and make sure we're all on the same page—automation is technology that allows a process or procedure to be performed with minimal or no human assistance. It's a broad term that's used for everything from lights that turn on by themselves with a photosensor to self-driving cars.

One key aspect of automation is the amount of human intervention involved and the complexity of the task that's being performed. A light that turns on and off by itself is hardly newsworthy, but a car that drives itself is significantly more interesting since driving a car is a more complex task, one that traditionally only a trained human can do. The same goes for other tasks like writing or any sort of creative endeavor and accounting (for the record—this article was written by a human!)



AUTOMATION IS A TOOL (AND IT'S BEEN AROUND A LONG TIME)

Automation, to some degree or another, has been part of our lives for hundreds of years; the earliest patents for inventions that did some sort of automated task date back to the 1700s. Today, artificial intelligence is the next frontier in automation. **The development of artificial intelligence** has even started to take over tasks that we previously thought only humans could do (like driving a car).

And of course, there are those who cite artificial intelligence as a threat to humanity, but most experts agree that there are **sound strategies for making AI work for us**—and not the other way around.

The point is that regardless of how you view automation, you're inevitably benefiting from it already.

KEY AUTOMATION TOOLS FOR ACCOUNTANTS

When spreadsheet software was introduced, accountants everywhere rejoiced—digital spreadsheets added the first effective automation tools that accountants could fully take advantage of (but a lot was still very manual, obviously). Since then, a lot has happened with automation technology, and today's accountant now has dozens of options to streamline many of their day-to-day processes.

Here are just a few automation tools that make an accountant's day-to-day easier.

- **ADP:** With ADP, many tedious tasks like payroll taxes, benefits administration, and connecting human resources to accounting are automated.
- **Jetpack Workflow:** Jetpack Workflow is a workflow and project management software that's been tailored to the specific needs of accountants. Many accounting firms faced tough challenges when they suddenly had to make their operation **remote-friendly**. Jetpack Workflow was designed to help distributed accounting teams work more efficiently.
- **Botkeeper:** (shameless plug) Botkeeper's goal is to help accounting professionals make their bookkeeping tasks significantly more efficient by using human-assisted AI tools. This allows accounting firms to scale quickly while simultaneously reducing their overhead.

WHAT DOES THIS MEAN FOR CPAS?

Automation tools have improved in areas of affordability, ease of use, and total capabilities.

Does this mean that the machines have taken over? No way! Right now, all these automation tools have a **decidedly positive impact** on the lives of CPAs, and there's no indication that an accountant should fear automation related to their own job security.

AUTOMATION MAKES ACCOUNTANTS HAPPIER

This has big implications for the mental health of accounting professionals. It's very common for accountants to suffer from high levels of stress and anxiety, which can take a serious toll on their health.

Automating a larger portion of your bookkeeping tasks helps you focus more of your energy on taking over a strategic and advisory role with your clients, and this is a shift that many CPAs tend to appreciate.

To sum up, being able to achieve a **better work-life balance** is a valuable investment in your career's longevity.

IT MAKES YOUR WHOLE PRACTICE MORE RESILIENT

2020 taught us that the most catastrophic scenarios we can possibly think of are quite possible. Most CPAs never thought that one day they simply wouldn't be able to go to the office, but look at us now! Automation tools allow you to minimize such a risk by making sure that key actions are taken automatically.

And since most tools are cloud-based, they allow you to **remain productive** while working from anywhere. You're no longer tethered to your office desk. Now, more than ever, to take your office with you, all you have to do is pack your laptop—or make sure your smartphone is charged!

IT MAKES YOU MORE PROFITABLE

Automation tools let you do more in less time. Being able to automate tedious tasks that were necessary but didn't necessarily add value to your clients allows you to significantly **increase your profitability**.

Even if it means you're in a good place from a client perspective and growth isn't the top priority, being able to free up more of your time and mental bandwidth allows you to be more strategically focused on where you want your firm to go.

What's been the biggest change in recent years is the availability of these high-tech solutions to smaller accounting firms. Now, instead of just the biggest firms having the best technology, everyone has access to tools that will save them time and money and enable accounting firm growth.



AUTOMATION EMPOWERS FIRMS TO DRIVE GREATER VALUE

Everyone looks for ways to make their lives easier and less stressful. Understandably, CPAs have met automation tools with a certain degree of fear and caution. After all, you're trusting this technology with your work and your client's business. But rather than live in fear of it, now's the time to **embrace technology** and make the most of the tools that are available to you.

After all, automation doesn't decrease the value of what you do as CPAs—but rather it increases the value you can provide to your clients.

To learn more about how Botkeeper works for firms of all sizes and specialties, click below to get a complimentary custom assessment of how automation can benefit your firm!

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