

A man in a dark suit stands with his back to the camera, looking out a large window. The office is modern with white structural columns and wooden desks. The floor is polished concrete. The view outside shows a city skyline.

A supplement to *accountingtoday*

# The remote challenge

Managing a dispersed workforce means new techniques,  
new tools, and new mindsets

# Facing the challenge of remote

Accounting firms are working to adapt to the needs of a new kind of workforce

By Antoinette Alexander

In 2011, Dillon CPAs in Katy, Texas, first opened its doors as a traditional accounting firm. Less than 10 years later, the firm sent all of its staff home and never came back — to a brick-and-mortar office, that is.

“With COVID we kind of pivoted and sent everybody home. We were already moving that way to embrace remote work and remote employees, but COVID accelerated that for us, thankfully,” said president Marcus Dillon.

Prior to the pandemic, Dillon said that the firm, while not remote, was not a complete stranger to flexible work arrangements and already had in place flex schedules for a few of its staff members. These were, however, exceptions and not the norm. “We knew that moving remote would give us an opportunity to do that even more. ... So, we were already kind of thinking that would be a great move, but our working parents actually liked the boundaries that were in place with coming to the office. So, when COVID didn’t allow for that, it actually gave them the opportunity to test that at home,” he said. “And after they saw success there, and we saw how effective they could be at home, we just never came back.”

The firm still owns its office building, which is sub-leased, and also houses some conference space and team rooms should staff need them. However, the firm’s entire 20-person staff now works remotely. “Being remote, I think it’s the new norm. It allows us to recruit and hire talent across borders and so, I think, that’s the really neat thing we saw as an opportunity three to five years ago, and just now being where we’re at and being able to see that and the fruits of being remote,” said Dillon. “There was a little bit of pain to go through that, but it was all worth it.”

Dillon CPAs is among a growing number of firms embracing a remote, or at least a hybrid, work environment. In fact, the 2020 ConvergenceCoaching “Anytime, Anywhere Work Survey” found that, when the pandemic hit, 61% of firms considered their transition to remote to be seamless because they were already supporting some remote talent. Only 8% kept most or all of their people in the office because their technology did not support a switch to working offsite.

There’s no doubt that the pandemic ignited a “rush to remote” movement for businesses — including accounting firms — to maintain operations. Now, two years later, firms are taking pause to reflect on the successes and challenges they’ve faced, and to reexamine and fine-tune their operating model, workflow processes, technology, firm culture, and more, in today’s “new normal.”

“Some firms are just ... charging ahead with figuring out how they can adjust their management strategies and their leadership mindsets so they can manage people no matter where or when they’re working,” said Renee Moelders, a partner with national consulting firm ConvergenceCoaching. “And that requires changes, but they are saying, ‘OK, what do we need to change to be able to do that?’ That’s what firms are going to be competing against, that’s the risk of being a ‘Let’s all go back to the office’ firm. ... The whole competitive landscape for talent has changed.”

Research further supports the risks that firm face in not embracing a remote, or at least hybrid, work environment. According to 2022 research by human resources consulting firm Robert Half, nearly half (43%) of finance and accounting employees surveyed said they are actively searching for a new role, or plan to, by the end of the year. One of the main reasons professionals in this sector plan to look for a new job? Remote-work flexibility.

The questions many firms face are: How do you effectively manage a remote workforce? How do you ensure staff productivity? How do you build and sustain firm culture? What are the technologies needed to enable a successful remote work model? The good news is that a growing number of industry leaders are paving the way to success and are sharing some best practices.

**Fine-tune your strategy**

As noted earlier, many firms are reexamining and fine-tuning their operating mode.

Said Carla Caldwell, founder of Caldwell Consulting & Training, “I think [firms] are becoming a lot more thoughtful and considerate about the choices they’ve made. And ‘considerate’ meaning they are considering more choices. They are considering: Has this [remote model] been working? Does this make sense going forward? Are we really more productive? And what does that look like? ... They are really reviewing what they’ve done, figuring out what went well and what didn’t, and then really getting thoughtful about how to maintain that going forward instead of it just being under an emergency situation.”

Take, for instance, The Bonadio Group in Rochester, New York. The Top 100 Firm actually started inviting staff back into the physical office in July 2020, should they wish, but never lost sight of the need for flexibility and its focus on the employee experience. The firm has long had a flexible work option available, but it wasn’t consistently

## Spotlight on

### Right Networks



**Roman Kepczyk**  
Director of firm  
technology strategy

**How much do firms need to change their management practices to manage a remote workforce?**

Moving to a remote (or hybrid) workforce has been an important catalyst for firms that needed to create and foster a healthy cadence of communication. The remote workforce is forcing them to find more accurate and clear ways of measuring an employee’s work that go beyond their physical proximity. The pandemic taught us that our people are our most valuable asset, and that prioritizing consistent communication is the key to better work no matter where they are.

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applied or used throughout the firm. Times have changed. During the past 18 months, the firm has taken several actions to further strengthen and improve the employee experience. For example, Bonadio conducted “stay interviews” to gather feedback from employees about ways to improve performance and enhance culture, and developed strategies and solutions to reinvent work processes and improve work-life balance.

“Our model is based around flexibility. It’s based on giving them the flexibility to work from home or work remotely when it makes sense. We really focus on: Take a look at the responsibilities you have on a particular day, the responsibilities you have to your client, the responsibilities that we have to each other, the responsibilities to train each other, to develop each other, to plan jobs,” said chief executive officer Bruce Zicari. “And, if on that particular day, you have responsibilities that are better done in person, then we really encourage people to come in. On the other hand, if you have a particular day that it’s mostly admin or wrapping up a job and it doesn’t require a lot of in-person interaction, then no problem. So we’re really relying on our people to make good decisions.”

To fine-tune and strengthen its remote work model, the firm developed guidelines and opened the lines of communication to ensure the remote work model was applied consistently throughout the firm and that all partners and leaders were in sync and on board.

As part of the process, the firm established “insight teams.” Said Zicari, “It really centered upon listening to our people, so there were essentially ‘stay interviews’ that were conducted across the firm. We picked a group of our high-performing leaders that we knew were connected and respected throughout the firm. We hired a consultant that ran the process. ... And we gathered feedback from a cross section of employees to understand how our current practices impacted their performance both positively and negatively.”

Zicari said that the insights gained helped the firm to develop its flexible work model and address change management, as well as make competitive adjustments to its compensation and benefits, titles, promotion structures, bonus programs, etc.

“Listen to your people. Don’t assume that you know what’s important to them — that was really, I think, the message that came through loud and clear as we went through our ‘insight team’ process,” Zicari said.

**Rethink productivity measurements**

When working in an office it is easy for managers to casually drop by a staffer’s desk to check in or engage in hallway conversations. That’s not the case when working remotely. Managers may be left feeling disconnected or uninformed on how work is progressing. Therefore, it is important for firms that have transitioned to a remote work environment to rethink how they measure productiv-

ity and to place even greater importance on communication. Ed Guttenplan, managing shareholder at WilkinGuttenplan, which has offices in East Brunswick, New Jersey, and New York City, said a remote work model “requires an environment of trust and focusing on what’s important, not where you sit.”

“We manage by delivery and internal metrics regarding service delivery and productivity. We have numerous internal groups and opportunities for engagement. Most importantly, we listen and are constantly seeking feedback,” said Guttenplan, when asked about measuring and ensuring productivity.

Said Darren Root, chief strategist of Right Networks, a managed service provider for accounting firms and professionals, “I think firms have learned, as they look back, that measuring hours worked is not an effective measuring tool anymore. I think measuring productivity is the big shift. It is kind of the big ‘Aha!’”

Added Root, “We have to develop this mindset on what does productivity mean and how do we measure that against the set of goals?”

John Mitchell, culture and workforce advisor for Right Networks, said, “[Employers are] used to measuring whether the employee is working by where their car is parked. Is your car parked at 9 o’clock in the morning in my parking lot? if it is, you must be working, which is, as we know, ridiculous and not particularly true. ... So, it forced them to have some conversations about: What do I expect from you as an employee of this firm? What are the goals and what big, measurable things do you need to do as part of your job, whether it is at 9 o’clock in the morning or 11 o’clock at night?”

Dillon of Dillon CPAs said his firm has implemented several ways to help ensure employees remain productive and successful in a remote work model. This includes using a practice management solution that tracks projects and has a dashboard where staff can view assigned tasks. This, however, is just one component of its multipronged approach: “We believe in time blocking and setting out your ideal day. ... So, we have people kind of define their ideal week, when they work best. And knowing that some people work best at 10 o’clock in the morning and some people work best at 6~30 at night. So, we just want that balance for every employee and, as long as it works for the team and the client, we’re behind them 100% to define that flexibility that works for them.”

In addition, the firm has built Teams into its remote work culture, said Dillon. The firm has established a channel in Teams it refers as the “Daily Three,” which is where in the morning each team member posts their top three priorities for the day that can be viewed firmwide, enabling team members to weigh in and help, if needed.

Leveraging collaboration tools like Teams and Zoom can also help with productivity, as well as with training and the transfer of knowledge. In addition, opening a

**Spotlight on**

**Paychex**



**Leslie Bolton**  
**Director of channel partnerships**

**How much do firms need to change their management practices to manage a**

**remote workforce?**

Firm owners are struggling with managing a dispersed workforce. Accountants are more keenly aware of tax implications that come with a remote workforce; however, managing those employees and keeping them engaged is a separate yet important topic. Firms that were hiring remote workers pre-pandemic have been thriving in today’s labor market while others are struggling. The difference seems to be the investment into tools and training programs for onboarding and keeping top talent engaged.

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Zoom call and leaving it open all day as team members work can be a way to replicate the feeling of being physically in the office. “We like the idea of assigning a manager or supervisor to those ‘rooms’ and they would be working in there all day, with camera off and working on their own things but they are available when people get stuck or have questions,” Moelders said.

**Build, sustain firm culture**

While there are no doubt benefits to going remote, it can be challenging to build and sustain a strong firm culture. Therefore, it is essential that communication be intentional and meetings have purpose. For a growing number of firms with remote or hybrid work models, having regularly scheduled stand-up meetings, also known as “the stand,” has become very important in helping to build and sustain firm culture. During these meetings (which are virtual for remote workers), team members can engage and share status reports on their work.

Stand-up meetings — which have long been popular in the tech universe — are typically time-boxed to maybe 10 or 15 minutes and take place with participants standing up to help keep the meeting short and to the point.

“The stand is now virtual. It’s always been popular in the tech world, but ... this 10 minutes in the morning of communication, virtually, makes your team feel like you’re still together in a way,” Root said.

Christine Anderson, senior vice president of human resources at Wolters Kluwer Tax & Accounting, said the vendor has internally embraced a hybrid work model, which usually means a minimum of two days a week in the office. It has taken measures to help sustain its sense of community. “In our tax and accounting division, which I’m the HR lead for, we have said that every office space role across the world is eligible for that hybrid. We have, for the most part, looked at it to be two specific days, for now. Our reasoning for that is that we actually want people to have this balance between flexible work and continuing this creation of community,” Anderson said.

Dillon stressed the importance of ensuring staff doesn’t feel like they are operating in a silo and doing regular check-ins. For instance, the firm holds retreats three times a year and at least one of those events is held in person.

“We won’t cover any technical education, it will all just be cultural and other things that are important to us. ... Just learning how to work better as a team,” Dillon said. In addition, the firm holds a stand-up meeting every Tuesday morning.

To help ensure its team members stay healthy, Dillon said the firm sends staff a weekly survey that inquires about their stress level, workload and highs/lows for the week. To complement the survey, the firm recently implemented one-on-ones in which a team member will meet with another person on the team to further share their thoughts and concerns. Additional ways that firms

can help build firm culture include:

- ▶ Holding regional in-person meetings.
- ▶ Coordinating online social events, like happy hours or painting parties, to help strengthen connections.
- ▶ Bringing in guest speakers.
- ▶ Having places, like a channel within Teams or Slack, where people can share fun videos, celebrate birthdays, talk about hobbies and interests, etc.

**Have the right technology**

Of course, having the right tools and technologies in place is essential in a remote or hybrid work environment.

“Everything needs to be accessible from everywhere. So every tool, every tax return, all of that stuff that a firm has needs to be accessible from everywhere. The challenge with that is how do you do this in a secure way? ... I think rethinking a strategy, an IT infrastructure strategy, if you will, for how you are going to work from anywhere is an important conversation to have inside of a firm,” said Root. “I think IT is critically important. I think another one is workflow management.”

Jody Padar, head of tax and evangelism at tax platform April, also pointed to the importance of a workflow solution and said, “I do believe workflow is probably the No. 1 software that you need because you can’t manage work in an email, it doesn’t work. ... Workflow software isn’t new, it’s been around, but I would say most of the time it was used for tax return workflow, not necessarily for accounting and bookkeeping workflow. So you have to kind of figure out what that is and how to adjust it, but it’s all about managing work and not time.”

Additional tools and technologies to consider include:

- ▶ A cybersecurity platform like Practice Protect, which can provide team members with, among other things, a single set of login credentials across cloud apps, online portals, client apps and email/file systems.
- ▶ Online appointment scheduling software.
- ▶ A cloud-based practice management solution.

**Embrace a new mindset**

Change management can be one of the biggest hurdles to a successful remote work model. Firm leaders must be onboard and on the same page when it comes to working remotely to set the tone from the top. “This is not about going back and polishing up an old business model and trying to make that a little bit better. This is about thinking differently. It’s a new mindset,” Root said.

Added Mitchell, “We believe that what happened during the pandemic will cause an evolution in the profession, with a catalyst for something that needed to happen anyway and where we prioritize our teams and our client list in a new way. I think this has caused us to be really excited and really optimistic about the future of the profession, but it takes a new mindset and that’s what we’re trying to lead.” **AT**

**Spotlight on**

**FloQast**



**Stefan van Duyvendijk**  
**Accounting operations evangelist**

**How much do firms need to change their management practices to manage a remote workforce?**

Firms face many struggles with remote workforces. Not only with their own staff, but that of their clients as well. Digitization of processes and documents as well as digitization of collaboration have become necessary in this new environment. Firms need to change their management practices to embrace a digitization-first approach in technology, process and culture. By doing so, they will more seamlessly be able to work with their staff and their clients’ staff in the new business model.

**How are you helping firms empower remote staff?**

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