



# Customer Testimonial

## Practice Management Solution



*“ WorkPool allows us to systemise the rule and humanise the exception ”*

**Arnold Scholtz**  
Director – ASL Group

## Accountants & Auditors

### Why do you use WorkPool?

I am the partner who is responsible for the overall management of the practice, “Practice Manager” if you will. We have various focus areas: Audit, Tax, Support services, Payroll, etc. We use WorkPool to systemise rules and prevent us from dropping the ball. Basically anything that you can manage with a formula you can plug into WorkPool and rely on it.

### What were the challenges you wanted to overcome?

Our managers’ non billable time was very high. We had lots of internal emails flying around because people would always be CC’ed on emails and the managers especially were always CC’ed on everything to keep them updated on progress and so they could keep their own tracking systems updated. Some small detail like “the tax form has now moved from here to there” had to be recorded. WorkPool freed up a lot of this non-billable time so that they could focus on billable work.

WorkPool also forces everyone to follow best practice and, since the information is in the system, it removes the need for questions like “What template did you use last time?” We’ve dropped the ball before because people were using each other’s templates. If they used the wrong template or didn’t have the right ticks on the template, then, for example, the tax form wouldn’t be completed correctly. When we finished the financial statements we thought we’d done everything we should have, but meanwhile there was no check to ensure the tax form was submitted or the assessment has been received. We also have international standards of quality control that impose rules and guidelines around lockdowns, etc. We could build all of these checks and controls into WorkPool, before we were reliant on people to do this or to choose what they should and shouldn’t do.

*continued below...*

*“ saves us between R15,000 and R25,000 per month ”*

### Why did you choose WorkPool?

We were looking for a solution that could systemise the rule. Something we could use to put rules and tick boxes in place to ensure people stick to the practice’s standards. In our industry, the way each practice works is somewhat unique. We all need to take an audit throughout the process, but the way we design and do our “best practice” is unique to us.

We were looking for something like WorkPool to help manage this, but didn’t know it existed until someone who had worked with WorkPool recommended it to us. We’d looked at other software solutions like Caseware but it wasn’t really a fit for us. From a workflow perspective there wasn’t anything available we could find, at a cost point that was acceptable to us and customisable to such an extent that it would do what we wanted it to. We even considered having someone write a solution specifically for us in Sharepoint. When we heard about WorkPool, what you can do with it and how it could specifically address the issue with the managers’ non-billable time, we had a presentation and committed to an implementation assessment.

## What were the challenges you wanted to overcome? *(continued)*

... In the past we had to try and manage this by pushing it into an email, spreadsheet or whatever. The same standard could never be achieved from start to finish. Now we have tick boxes that are governed by a process with tasks that kick off, which is great. In my role I mostly use WorkPool for quality control of an audit file or statements that need to go out, so I only get tasked when the process reaches a certain point and when the other people have already done their job.

Our managers also provide us with a WorkPool report on a monthly basis to indicate their progress on work, what is in progress for the next month and what is going to come our way in the next month. This allows us to plan. In the past we used Excel for this and someone had to keep the spreadsheet updated manually. There were 5 managers responsible to maintain this information, each with their own spreadsheet, and then someone would have to combine it into one. All it takes is one person to change the spreadsheet and add new columns and things would be messed up.

## What were the implementation challenges?

We are still busy overcoming some of the challenges. Initially it was to understand exactly what we can do and cannot do, and to what extent we were going to roll it out to the whole practice vs. only certain departments. Some things that we haven't pulled in yet still live outside of WorkPool. We decided to give everyone training so as a business we can do everything in WorkPool. But we realised that if we didn't drive the process and set things up to run through from start to finish, they didn't flow the way we wanted it to. In that approach the process won't work and things won't flow properly if everyone isn't on board. So looking back, I think we should have limited the initial rollout to audit and accounting as we could have ensured that we implemented 1 or 2 processes properly and then, having a success story, roll it out to the other departments like tax and company secretarial.

We knew our old processes weren't working and we knew that WorkPool was working elsewhere. We had to change; there was just no other way. The managers mainly drove the implementation, not the directors/partners. The managers were the ones who asked for help and suggested that we change the process. We did get pushback from people initially as they asked "Why must I do this, why must I do that?" as well as from people who did not kick off tasks. We each have a role to play and among some people this just had to be reinforced. When something came to me to work on I would ask the person where the WorkPool task was to get them to update the system first.

The biggest change management issue was probably email. It was the way we managed things before and people were very attached to it. Initially we tried to switch users over from Outlook to WorkPool's email entirely, but because the rules and the interface differ this did not go down well. We ended up leaving Outlook in place and allowing users to drag and drop select emails from Outlook into WorkPool where they can then file it. I don't like that we keep our main email accounts separate from WorkPool. It would be better if we were fully integrated on WorkPool's email so we could have the same track-ability on emails. At the moment, if an email goes to the secretarial group I cannot see who it is going to do it or if someone is busy with something. We still need to systemise the rule in those departments – but most of the work has been done.

## What do you like most?

I like the processes the most, the fact that tasks can kick off automatically. I like the reliability and trustworthiness of WorkPool. For instance the reports we get from WorkPool now are at a point where we no longer question the information, we are no longer worried about the human error that someone will lose something. We know that if something doesn't come up then it isn't in the system, and when enough time has passed we know everything must be in the system so this gives us peace of mind.

## What benefits have you derived through this process?

- Managers no longer have to administer the process. This **saves us between R15,000 and R25,000 per month** on time opportunity cost and billable time, maybe more.
- WorkPool promotes accountability; it is not like a task is going to disappear, you need to tick off the box. In audit we often refer to “phantom ticking”. You cannot phantom tick something if you haven’t done it as it will boomerang later.
- We now have on the fly reporting to indicate the status of a process and deadlines. In the past we would rely on emails and people updating spreadsheets to track what was where.
- When someone is off sick we can see what they are busy with and their scheduled jobs. This allows us to reallocate tasks which we could not do before.
- The excessive emailing that happened in the office on a micro level to keep people informed –sometimes playing hot potato – has become totally unnecessary. Now, when you communicate, you communicate something of substance instead of having to explain a process flow.
- Commitments and deadlines can be managed and are visible to all. Using paper files and updating them as they move around is limited. If a file falls behind someone’s desk and the submission date passes and no one knows where it is, no one even realises it is gone!
- The process of taking on new clients or clients leaving our practice is also managed on WorkPool. This helps the office manager manage the work and accountability around who must do what. WorkPool pulls information from another system - our own custom client database - so that all the client information we need is also available in WorkPool and as part of our processes.

## The way forward?

The biggest problem is always time management. Anything that can help us with efficiency is a bonus. Any industry selling its time is in that same game. Who knows to what extent machine learning will take over our work in the future – we can already see it in certain environments. The traditional model of, for example, 12 staff members to one partner/director will also have to change as you will either need more staff to do the work or you need to systemise to operate more effectively. Of course the more people are involved the bigger the likelihood of human error. The fact that we can pull through our standards and best practices into any environment is a good value add for WorkPool. This also helps us with new graduates as they pose a real problem these days because they don’t always have the same ability or skills to apply common sense and think beyond the basics of an instruction.

## Would you recommend WorkPool?

Yes I would recommend it. I am a promoter of the idea of “*systemise the rule and humanise the exception*”. WorkPool allows us to do this. We know there is still a lot more that we can do with WorkPool, or more ways we can apply WorkPool, but our initial focus was on addressing specific issues.

