



# Customer Testimonial

## Practice Management Solution



*“ WorkPool helps us to remove mediocrity and make our level of service exceptional. ”*

**Jaco van Straaten**  
Director – ASL Group

## Accountants & Auditors

### Why do you use WorkPool?

In short: Standardisation of tasks; making sure things get done.

WorkPool is a business nervous system, but we use it as a practice management system. It allows us to manage responsibility and accountability and see where any balls were dropped. My focus is on the Tax, Company Secretarial and Payroll departments but I also have a joint responsibility on the Information Technology side.

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

Accountability. We had a tax department with one mailbox and we never knew for certain who was doing what or who did what on which tasks. We wanted the task's accountability to rest with a specific person, not “the tax department”. Unlike on the audit and accounting side, in all three of my departments, we don't typically assign a client to a specific staff member. As such we don't always know in advance who will be doing what for whom, and we cannot always guess who will be dealing with a task for a specific client. The only way to find out was to ask around. With WorkPool there is a measure of control and transparency. We can see who is responsible for what, a person's workload and by when a task is due.

So many things happening at the same time and we need to make sure they happen when they are supposed to. “To do” lists get unimaginably long as there are too many things to remember. Our workload is still the same, so the WorkPool task lists also get unimaginably long. But at least we have control; before WorkPool it was a black hole. I do not know how we tracked things. For example, if a “client take on” has 10 steps and you take on 30 clients it can result in 300 tasks. Keeping track of and managing that is a real challenge and it takes a lot of time and effort. Auditors and accountants love Excel so you can easily end up with thousands of spreadsheets running around the practice. Even after WorkPool we still have some Excel sheets flowing around - it hasn't gone away completely.

### What do you like most?

I like processes and the fact that you can make them recurring. You can design your own process once and then use it again and again without having to manually manage it. Take for instance our billing process: at month-end when we do our invoicing, WorkPool collects the information from people and I can track when it's been done. I just run the process and the system tells me what to do without having to think or figure things out.

### WorkPool in 3 words?

- Revolutionary
- Efficiency
- Accountability

## What were the implementation challenges?

It was frustrating at the beginning. You have to get peoples' buy-in and deal with varied levels of IT literacy. We probably tried to do too much too soon when we should have rather eased into. We have learned that it is better to start small and then use processes to extend it further. If one person doesn't do their part then something can get stuck.

It is important that you get the buy-in of management first as it makes enforcing things easier. I had to deal with people who thought updating their WorkPool was a "schlep" and who did not complete their tasks. This frustrated the office manager to no end, but I just had put my foot down and tell them to update the tasks.

I think for us, timing also played a role. Once we'd implemented WorkPool the main driver was absent for an extended period of time so he could not drive the implementation as per the initial plan. This meant that we had to rely on people to embrace WorkPool and change by themselves which was not effective.

**One of our main goals when implementing WorkPool was to remove mediocrity and make our level of service exceptional.** Our goal was not really to make more money but rather avoid frustration. Yes, it is a bit frustrating to create a task, but it gets easier and we save a lot of time. Not everyone is beyond the frustration yet. It is a process and we have to keep at it.

## What benefits have you derived through this process?

- Preventing mistakes and people dropping the ball: People are people and they still make mistakes, but at least we can pin point it now. We recently had a case where someone in our tax department wasn't updating their WorkPool tasks. When this was picked up we could see a few other things that weren't done too and we could step in to sort it out. **Without WorkPool we would have been in the dark** and I wouldn't have known about these other issues. In the past it would have taken us up to a day to find out. Now I know at the click of a button.
- A lot less time is spent on management: Many things now happen without us being involved.
- Time saved on administration and reports: In our Audit department alone we have many manual lists that have been replaced completely by WorkPool. Previously each manager had to keep a list of all their jobs and report back to the partner who would then review and comment on them individually. Now we get all the information from WorkPool and use an Excel macro to put it in our old format that we are used to. This saves a lot of time and one person can now collate all the information automatically based on real-time details.
- Less email communication: We no longer receive lots of emails and our paper trail is also significantly less.
- Improved client service and retention: We use recurring tasks for reminders about things like annual tax clearances. Since we take proactive action it helps us to secure the same job again the next year. We also do it early enough so the client is happy with our service and we can remind them before they ask us.
- Control over detailed processes like "client take on" or "client exit": **WorkPool helps us with the checks and balances and ensures everyone knows what they must do as it is controlled from a single place.**

We know that we are not using WorkPool to its full potential. We may not be getting the biggest return on investment, but this is not because WorkPool isn't giving us what we need. We aren't driving the process hard enough. But we have done a lot already, such as replacing the Excel sheets and Work In Progress reports - a massive spreadsheet with 30 columns that we used to spend an hour or more on every week to update.

## The way forward?

In terms of WorkPool being a **business nervous system** - with all of what that entails - it is still very underutilised in our practice. We definitely need to make more use of its processes so that we can become more systemised.

Our main challenge is not having enough time. Compliance requirements are increasing and email volumes are incredibly high. Time management is our biggest issue. You need to optimise your time to do the right things. How do you grow the business if you still write about the same amount of fees that you did 7 years ago? Obviously things like cash flow and building your client base with the right clients, etc. is important, but at the end of the day the thing I have least of, and what I want the most, is time. You cannot make time. You can always find more clients. The only thing you can do is ensure you **utilise your time as best you can**, which is what WorkPool's main objective is too.

