



Audit from anywhere: The role of remote work in evolving your practice

Now featuring best practices for managing remote
audit teams



A remote work environment enables your firm to maintain its edge in a competitive job market and provide the flexibility that many of today's professionals are seeking in an employer.

Running your firm remotely? How auditors can work from home successfully.

Can auditors work from home? The short answer is - Yes!

Even before the COVID-19 pandemic, tax and accounting firms had begun embracing the benefits of cloud-based practices, empowering their staff to perform their duties and tasks from practically any computer, tablet, or mobile device. Advancements in technology have resulted in remote work becoming increasingly normalized, as employee expectations and desires shift, and firms discover the benefits that exist when working outside the constraints of a traditional bricks-and-mortar office.

In fact, tax and accounting jobs have been some of the most popular remote roles available for the past few years¹. Nearly half² of all tax and accounting firms had already begun building a work-from-home culture into their practice before the global health crisis and mandatory quarantine gripped the world. We can expect those numbers to continue growing, as the entire planet adapts to the new way of conducting business.

As top employees in the profession seek greater work-life balance and begin to disqualify potential employers based on their work-from-home policy (or lack thereof), tax and accounting firms who are unable to adapt place themselves at a significant disadvantage. To help you and your staff succeed, here are some actionable tips and insights to help ensure your firm can keep working in any scenario.

In this white paper, we will review:

1. Why employees need to be able to work from home
2. How a work-from-home policy helps your firm recruit and retain the best employees
3. How to establish a strong virtual infrastructure to support remote tax and accounting work
4. How to ensure collaboration amongst team members and clients virtually
5. Best practices for managing a virtual audit team
6. Common misconceptions about remote work and tips for fostering work-from-home culture
7. How to identify the best remote employees
8. How to encourage a healthy work-life balance
9. How to work in a shared home environment with your children and spouse

1. <https://www.cnbc.com/2018/03/09/these-are-the-14-most-common-remote-jobs-heres-how-much-they-pay.html>

2. 2018 Anytime, Anywhere Work. ConvergenceCoaching, 2018, <https://convergencecoaching.com/convergencecoaching-releases-findings-from-2018-anytime-anywhere-work-survey>

3. Brenan, Megan. U.S. Workers Discovering Affinity for Remote Work. Gallup, 3 Apr. 2020, news.gallup.com/poll/306695/workers-discovering-affinity-remote-work.aspx



INTERNET CONNECTIVITY TIPS

It is important to ensure that your staff working remotely have a quality internet connection.

In some instances, they may need to upgrade their service package or router for faster speeds. There are several sites available that can help staff test their home internet connection.

Keep in mind that there are ideal speeds for different tasks, such as video conferencing or uploading and downloading large documents.

1 Why employees need to be able to work from home

Why is it critical for tax and accounting employees to be able to work from home? For starters, it ensures your firm's continuity, regardless of where your employees are physically located. This is important not only as people seek greater work-life balance, it's also critical should your firm encounter an unexpected disruption like a fire, flood, or a global event like COVID-19.

A remote work environment also enables your firm to maintain its edge in a competitive job market and provide the flexibility that many of today's top professionals are seeking in an employer. According to Gallup data, more than half (54%) of workers said they'd change jobs for the option to work remotely.⁴

Under ordinary circumstances, work from home flexibility drives staff engagement, which means happier employees, more satisfied clients, and ultimately greater profitability for your firm.

While remote tax and accounting work is becoming more commonplace and firms that are unable to adapt risk placing themselves at a significant disadvantage, tax and accounting work-from-home still presents its share of challenges. Building and maintaining an effective and productive work-from-home environment (whether temporary or permanent) involves establishing a strong infrastructure, nurturing the right culture, and ensuring a healthy work-life balance.

2 How a work-from-home policy helps your firm recruit and retain the best employees

Top audit talent is seeking employment at firms that offer the latest tools, technology, and benefits. And although firm leaders recognize the value that audit talent brings, firms across the country still struggle to attract and retain their star performers.

Consider these developments:⁵

- High turnover rates have practically become synonymous with accounting firms, sometimes reaching up to 30% at large audit firms.⁶
- Firms that launch initiatives to address work/life balance issues are newsworthy, and the effort is almost guaranteed to earn them a spot on a "best places to work" list.

If your firm isn't keeping up with changes impacting audit practice, it becomes difficult to remain attractive to new and existing talent. Premier technology, efficient audit processes, and flexible work options are key to attracting top talent and stemming high turnover rates.⁷

A good work-from-home policy should clearly define:⁸

- Who is eligible to work from home
- The approval process
- Regular working hours
- Timekeeping policies and procedures for hourly employees
- Attendance and availability standards
- Preferred communication channels
- How to contact IT support
- Security protocols

When you solve the problems that send your star performers to jobs in private industry (or worse, your competition), your firm can become known as a firm of choice — one that employs the best and brightest people in the profession.⁹

5. Thomson Reuters Checkpoint and Boomer Consulting. (2018) The Progressive Firm's Guide to Attracting and Retaining Audit Talent

6. Khavis, Joshua and Jagan Krishnan. Employee Satisfaction in Accounting Firms, Work-Life Balance, Turnover, and Audit Quality (December 21, 2017).

Available: SSRN: <https://ssrn.com/abstract=3095057> or <http://dx.doi.org/10.2139/ssrn.3095057>

7. Thomson Reuters Checkpoint and Boomer Consulting. (2018) The Progressive Firm's Guide to Attracting and Retaining Audit Talent

8. <https://snacknation.com/blog/work-from-home-policy/>

9. Thomson Reuters Checkpoint and Boomer Consulting. (2018) The Progressive Firm's Guide to Attracting and Retaining Audit Talent

3 Establish strong virtual infrastructure with the right tools

You wouldn't want to live in a home with an unstable foundation. The same should hold true for your firm's remote work capabilities. Whether you have one remote staffer or your entire team working from home, it's essential to first establish a strong technical infrastructure for business continuity and security. By leveraging the right technology and having the proper internal protocols and security measures in place, you can better protect your firm and client data while also ensuring productive remote work.

LEVERAGE CLOUD-BASED SOFTWARE FOR REMOTE TAX WORK

For tax and accounting firms, cloud computing has become a critical component of effectively doing business, enabling both employees and clients to seamlessly collaborate from wherever they are. Cloud technology supports simple, secure file sharing and communication. Has your firm already adopted a centralized, cloud-based suite of tax and accounting tools? If so, you're ahead of the game. Ensuring that staff working from home have access to your firm's core applications and real-time client data is essential. With centralized data management and real-time updates, your staff will always stay in sync, regardless of where they are. Hosted software applications operate exactly as if they were installed locally, except that the solution provider handles software maintenance, updates, and data backups. This leaves you and your staff free to concentrate on what's most important — your clients. All you need to do is log in and go to work. Cloud-based software that enables your staff to work remotely offers many benefits, including:

Easy access to real-time data

24/7 access and availability

Multi-user access to the same data at the same time



Automatic software updates

Infinite storage capabilities

Faster and better collaboration with clients

Simpler recovery and back-up options

One of the biggest benefits of the cloud is seamless data sharing. Both Bob and Jane can work on the same client file at the same time. They won't need to check-out and check-in their workpapers, tax return worksheets or any other client data when they're using cloud-based software. Partnering with a solution provider that hosts software on secure data centers provides your team access to tax and accounting software and client data anytime, from anywhere. This helps ensure business continuance — no matter the situation.

4 Enable collaboration amongst team members and clients

To effectively manage a remote workforce, it is imperative to leverage an integrated suite of products that are designed to work together, rather than trying to cobble together disparate systems. This enables you to automate your workflow and raise the level of service you provide clients from any work environment.



THE BENEFITS OF AN INTEGRATED CLOUD-BASED TAX AND ACCOUNTING WORKFLOW INCLUDE:

- Reduced data entry because client data flows through in real time across all software programs
- Real-time access to current trial balances, payroll, financial reporting, and client data
- Secure remote access by clients to tax returns, payroll information, financial reporting, and other documents
- Improved practice management with due date tracking, task management, budgeting tools, realization rate projections, time and billing entry and oversight, and more
- Peace of mind that your client data is secure and encrypted, whether in transit or saved on the provider's servers
- The ability to manage both clients and staff from a single, user-friendly administration module

Working from home obviously means that there's much less face-to-face interaction among both team members and with clients. Therefore, it is essential to ensure that there's functionality in place for efficient collaboration. When the products you use for research and compliance work share the same database, there's no manual syncing required. Whether you're uploading client documents, recording employee time, entering client billing items, or updating a project status, you never have to worry about keying information in multiple places.

By leveraging a single, universally-accessible platform, your firm can easily create, modify, and share documents, manage your firm, and stay synchronized with colleagues and clients — all from the comfort of home. For instance, with 24/7 access to the messaging features in Microsoft® Exchange, employees can schedule meetings, stay in contact, and manage tasks quickly and easily. Plus, Microsoft Outlook email, calendar, and contacts can be accessed from any smartphone using ActiveSync. And Microsoft Teams enables staff and clients to chat, meet, call, and collaborate all in one place.

As many firms use the Microsoft suite, these tools are readily available to implement for a productive work-from-home environment. And if the workflow solution your firm chooses also works with popular document-sharing solutions, like Dropbox or Google Drive — or better yet — comes with a secure client portal, it will be easy for your clients to exchange documents and collaborate on edits with your staff.

You can even "assign" tasks to your clients that require their action, such as uploading necessary documents or completing e-signatures. Clients expect the firms they do business with to provide them with an efficient and secure way to collaborate and exchange information, regardless of your staff's location.



“Remember; when disaster strikes, the time to prepare has passed.”

— Steven Cyros

5 Best practices for managing a virtual audit team

1. Promote face to face contact

The first best practice of managing a virtual audit team is promoting person to person, face to face contact. Often, when we talk about collaboration tools, we forget that video conferencing is one of them. AuditWatch recommends using video conferencing whenever possible.

Consider the three components of communication: visual, vocal, and verbal. Visual is our body language, and it accounts for 55% of our communication. Vocal is our tone, our pace, and our pitch. Vocal accounts for 38% of communication. The last component of communication is verbal, the words that we speak, and that accounts for only 7% of our communication.

When communicating via email or another form of written communication, all we get are the words that we see on the page. How are those words being interpreted?

If we don't have a tool to facilitate face to face communication, we're losing over half - 55% - of what is being communicated. When considering written communication, we are losing whopping 93%.

AuditWatch promotes person to person, face to face contact whenever possible, via video conferencing, when you're part of a virtual team.

2. Be aware of distance bias

The next best practice of managing a virtual audit team is to involve remote employees in all aspects of work.

Recently at Thompson Reuters, all employees had to participate in bias training. One potential bias that we were taught about is distance bias. Distance bias simply points out that people generally prefer those physically closer to them by geography than those farther away. Now, bias is not necessarily a bad thing.

Many times, it's not intentional, but we need to be aware, and we also must be intentional if we want to break that bias. Virtual audit teams need to make a conscious effort to involve remote employees in all aspects of their work to avoid the remote team member feeling that they are "out of sight, out of mind".

Here are a few ways managers can ensure remote workers feel like part of the team:

- **Recognize or praise remote workers for good work.** We have a catchphrase here at [AuditWatch](#), which is feedback is a gift. Be intentional with your feedback, both constructive and complimentary. Make time to recognize and praise remote workers with the same frequency as those working in the office.
- **Talk to remote employees about career goals and personal growth.** Remember distance bias? Have you forgotten to check in with your employee about career development and personal growth because you no longer see that person on a daily basis?
- **Provide opportunities to connect to remote employees.** Again, make a conscious effort to connect with your remote employees. We always say that the drinks are optional, but a virtual happy hour is a great way to connect with your remote employees.

10. Staffing Remains Top Concern for CPA Firms, AICPA Survey Finds. AICPA, 13 June 2019, www.aicpa.org/press/pressreleases/2019/staffing-remains-top-concern-for-cpa-firms-survey-finds.html

11. Small Business Information Security: The Fundamentals. National Institute of Standards and Technology, 2016, nvlpubs.nist.gov/nistpubs/ir/2016/NIST.IR.7621r1.pdf

12. Small Business Information Security: The Fundamentals. National Institute of Standards and Technology, 2016, nvlpubs.nist.gov/nistpubs/ir/2016/NIST.IR.7621r1.pdf

3. Flexible scheduling

Finally, embrace flexible scheduling. One benefit that we've always had in public accounting is flexibility. Working remotely means embracing that flexibility, while at the same time, creating a plan to manage that flexibility.

Flexible hours, at least during the busiest part of the year, benefit your clients as well as your employees. Modern schedules don't adhere to a strict 9-5 timeline and staff as well as clients will thank you for the added convenience.

There might be people on your team who are better suited to working early in the morning or late at night. Depending on their schedules, these employees could be deployed to serve clients in other time zones.

Promote face to face contact. Be aware of distance bias. Embrace flexible scheduling. These best practices for managing remote audit teams can increase employee satisfaction and engagement. And the more engaged your team and your clients are, the more efficient your firm can be.

The importance of communication for remote teams

Communication is a foundational part of managing any team, whether you're virtual or not. As with any team, intentionality must be part of a manager's communication strategy.

Be mindful of your mode of communication. We know that communication is most effective when it's delivered face to face, however, that's not always reasonable so clarity is essential.

The fundamental element of communication is clarity. If people don't understand what you're trying to convey, you're not communicating effectively whether you're in person or on a video call. To that end, you should work to develop a clear and concise message.

Consider your audience and determine the best way to communicate:

- What point are you trying to get across?
- What action or reaction are you trying to get?
- Is your message something that should be delivered verbally in a meeting? If so, should some type of written communication follow?
- Should the message be delivered in a one-on-one phone call?
- Should you text, or send an instant message?

There is no one-size-fits-all method of communication, and you do need to evaluate the needs of every specific situation.

Meeting Participation

One of the things to keep in mind when you're working with a remote team, it's essential to understand that team members might be multitasking. It's very common, and we know that it can lead to a communication gap. We want to break that gap.

Consider communicating verbally during a team meeting and sending a follow-up with written notes. Better yet, get everyone to participation during that meeting. Ask for somebody in the group to take notes. It's a good idea to keep team meetings small and limit communication in these settings to only the people impacted by the discussion. The more relevant the message, the more likely the meeting participants will be engaged.

Open Dialogue

One element of a successful remote audit team is using open dialogue. Open and honest feedback is an important element for any team.

Feedback is a gift. It should be constructive and delivered from a place of genuine caring. At AuditWatch, we discourage constructive criticism being delivered via email or another written method of communication. Any written communication should only come after you've first had a face-to-face discussion.

Generally, team members have a desire to do good work and this open, honest feedback is a way to accomplish the best outcome for both a team member and the team as a whole.

When you're working in a virtual environment, clear, open communication is absolutely critical. Facts and circumstances are going to dictate the best approach, whether you're in a group meeting or a one-on-one phone call.

Communication is a two-way street

Remember that communication is a two-way street. If the first fundamental element of communication is clarity, the second is active listening.

Active listening means you're making a conscious effort to be present so that you truly receive the full message and feedback being conveyed.

Active listening requires your full attention. Refrain from multitasking. Active listening is another good reason to use your video camera in your meetings. Using video technology allows you to make eye contact and to use body language to show that you're engaged.

Also, remember that you cannot talk and listen at the same time. Always allow anyone who is speaking to finish their statement before you respond and show that you're curious about what they have to say. Don't use the time the other person is speaking to formulate your rebuttal, instead, clear your mind and focus on their statements and give them your undivided attention.



As discussed earlier, it's important for firms to ensure their staff have the right tools and technologies in place to work efficiently and collaboratively, whether in the office or at home. But technology is only part of the equation.

6 Create a work-from-home culture that really works

As the profession evolves and new, innovative technologies change the way people work, one of the biggest challenges for firms is change management. For a growing number of firms, this includes creating a work-from-home culture that actually works.

As discussed earlier, it is important for firms to ensure that associates have the right tools and technologies in place to work efficiently and collaboratively, whether in the office or at home. But technology is only part of the equation.

Those in leadership roles must proactively foster a positive work-from-home culture. This starts with dispelling commonly held misconceptions on working remotely, building trust, and fostering effective communication and collaboration. It's no secret that leadership can be hesitant to embrace remote work for their employees. This is often because they have a hard time getting past popular myths about staff who work from home.

Let's take a closer look:

Myth #1: Remote employees are unproductive.

Myth buster: Research suggests that the opposite holds true. In fact, an annual survey conducted by FlexJobs found that 65% of respondents said they are more productive in their home office than at a traditional workplace. Why? Fewer distractions and interruptions; less stress from no commute; minimal office politics; and a personalized, quiet environment. Furthermore, 85% of businesses confirmed that productivity increased in their company because of greater flexibility.¹³

Myth #2: Remote employees are unengaged.

Myth buster: Here's the reality: the majority of remote workers are happier in their jobs and experience less stress. An Amerisleep study found that more than half of respondents (57%) were more likely than the average American to be satisfied with their job when they had the opportunity to work remotely. Plus, nearly 80% of respondents reported significantly less stress when working from home.¹⁴

Myth #3: All remote employees are introverts.

Myth buster: People may often assume that all remote workers are introverts, but research shows that flexible work appeals to a wide variety of professionals for different reasons. According to a FlexJobs survey, pet owner, entrepreneur, living in a rural area, stay-at-home mom, and caregiver were among the top 10 self-identifiers.¹⁵

Successfully creating a work-from-home culture also requires that firm leaders trust employees' ability to perform and execute work outside of the traditional office setting. The reality is that you can't micromanage every minute of every day; you must allow employees a level of autonomy and trust that they will put in the hours to get their work done. Encouraging greater collaboration and communication among staff can help strengthen that trust and further drive employee engagement. This could include:

- Requiring schedule setting
- Sharing calendars for transparency
- Instant messaging and video conferencing for check-ins
- Being mindful of communication timing (i.e., Are there any times team members should not be disturbed? What's the expected response time to messages? Does that vary depending on what the message is, or the channel in which it is delivered?)¹⁶
- Starting each meeting with an icebreaker question

Informal communication is important for relationship building among staff, so even if you've been working together for some time, this can help you learn even more about your team.¹⁷

13. SafeguardingTaxpayer Data. IRS, www.irs.gov/pub/irs-pdf/p4557.pdf

14. Hering, Beth Braccio. Remote Work Statistics for 2020: New Norms and Expectations. FlexJobs, 13 Feb. 2020, www.flexjobs.com/blog/post/remote-work-statistics

15. Hering, Beth Braccio. Remote Work Statistics for 2020: New Norms and Expectations. FlexJobs, 13 Feb. 2020, www.flexjobs.com/blog/post/remote-work-statistics

16. Reynolds, Brie Weiler. FlexJobs 2018 Annual Survey: Workers Believe a Flexible or Remote Job Can Help Save Money, Reduce Stress, and More. FlexJobs, 29 Nov. 2018, www.flexjobs.com/blog/post/flexjobs-2018-annual-survey-workers-believe-flexible-remote-job-can-help-save-money-reduce-stress-more

17. Lew, Claire. How to Collaborate Effectively in a Remote Team - Know Your Team: Blog. Know Your Team, 22 Aug. 2019, knowyourteam.com/blog/2019/08/22/how-to-collaborate-effectively-in-a-remote-team

7 Tapping the best remote candidates

Not everyone thrives in a remote work environment. That's why it's important for management to identify and recruit the best candidates for a remote workforce, whenever possible. For example, an employee who needs a lot of handholding may not be the best fit for remote work.

To help identify the ideal candidates, consider the following skill sets:¹⁸

- They are not afraid of technology and are comfortable navigating common cloud-based solutions.
- They understand the importance of digital security and will take the proper steps to protect your firm and client data.
- They are self-starters.
- They can see a need and then take the appropriate actions without having to be told what to do.
- They are problem solvers and feel confident troubleshooting an issue before escalating it.
- They have strong communication skills in any format, including email, phone, video conference, and instant message.
- They understand the importance of strong collaboration. In fact, in a remote work environment, a sense of collegiality is especially important.

Identifying current staff who is best suited to remote work may be relatively easy. After all, you already know them, their skills set, and their personality traits. When hiring new associates for remote work, however, your recruiting focus needs to be broader than candidates with degrees in accounting to include those with skill sets in:¹⁹

- Business development
- Project management
- Marketing and branding
- Data analytics
- Technology
- Security
- Strategic planning
- Process management
- Innovation

Staffing firm Robert Half suggests adding the following to your list of interview questions:²⁰

- What is your history of working remotely?
- Tell me about the platforms you use (or have used) to collaborate with off-site colleagues.
- What do you do to minimize miscommunication in emails and instant messages?
- What are the three attributes that make you an effective remote worker?
- What are the greatest challenges of working off site?
- What is your approach to work-life balance when your job is remote?

You may even want to consider conducting the interview via video conference. This allows you to see how they present themselves, and you can gauge their equipment's and bandwidth's suitability for remote work.

18. Thomson Reuters Checkpoint and Boomer Consulting. (2018) The Progressive Firm's Guide to Attracting and Retaining Audit Talent

19. 8 Tips to Improve Collaboration in Remote Teams. Saberr, 20 Sept. 2018, blog.saberr.com/8-tips-to-improve-collaboration-in-remote-teams-40f2214df4d

20. How to Hire Remote Workers, Remotely. Robert Half, 10 Apr. 2020, www.roberthalf.com/blog/evaluating-job-candidates/how-to-hire-remote-workers-remotely

8 Encourage a healthy work-life balance

Establishing and maintaining a healthy work-life balance when working from home can be harder than you think. It's easy to let work infringe on your off-hours when your office is in your home, and technology like smartphones makes you easily accessible and likely feeling as though you're "always on."

In fact, research suggests that unplugging from work is one of the biggest challenges for remote workers. Falling victim to being "always on" often leads to employee burnout, which can negatively impact both individual and organizational performance.

Consider this: Gallup research indicates that employees who say they "very often" or "always" experience work-related burnout are:²¹

- **63% more likely** to take a sick day
- **Half as likely** to discuss how to approach performance goals with their manager
- **23% more likely** to visit the emergency room
- **2.6 times more likely** to leave their current employer
- **13% less confident** in their performance

A survey from staffing firm Accountemps, a Robert Half company which specializes in staffing service for temporary accounting, finance, and bookkeeping professionals, found that nearly all senior managers (96%) believe their team members are experiencing some degree of burnout.

In a separate survey, 91% of workers said they are at least "somewhat" burned out.²² This growing threat is not going unnoticed as more and more companies look for solutions to improve work-life balance, such as greater flexibility and compressed work weeks (working four days versus five days per week). Trimming the work week down to four days may not ideal for your firm, but providing your staff with the ability to work remotely and encouraging them to maintain a healthy work-life balance will go a long way toward greater productivity, employee morale, and ultimately, firm profitability.



TO HELP YOUR EMPLOYEES MAINTAIN A HEALTHY WORK-LIFE BALANCE AND BOOST PRODUCTIVITY, CONSIDER THE FOLLOWING TIPS:

Create a workspace and work in the same place each day (avoid working from your kitchen table, if possible).

Set a daily routine — and stick to it. This means having a consistent start and end time each day.

Check in with co-workers via instant messaging/chat, phone, or video conference to maintain connections and relationships.

Schedule time for breaks, whether it's to grab a snack, make personal phone calls, or brew another cup of coffee.

Get some fresh air and exercise.

Keep a to-do list.

Plan your next workday.

21. Wigert, Ben, and Sangeeta Agrawal. Employee Burnout, Part 1: The 5 Main Causes. Gallup, 12 July 2018, www.gallup.com/workplace/237059/employee-burnout-part-main-causes.aspx.

22. Survey: 96% Of Managers Say Their Staff Are Experiencing Some Degree Of Burnout. Robert Half, 20 Aug. 2019, rh-us.mediaroom.com/2019-08-20-Survey-96-Of-Managers-Say-Their-Staff-Are-Experiencing-Some-Degree-Of-Burnout.



As employee expectations and desires shift in the wake of the COVID-19 outbreak, firms that are unable to maintain an efficient and productive remote work environment risk placing themselves at a significant disadvantage.

9 Tips for successful shared work/home spaces

Working from home doesn't always mean you're alone. Sometimes, it might be that more than one person is working from home and/or there are children in the house. In fact, this has become the reality for many Americans, as states issued stay-at-home orders, and businesses and schools shut their doors due to the COVID-19 pandemic. As many people have discovered firsthand, having children and significant others all sharing the same space, at the same time, is not easy.

Consider the following tips to help remote employees navigate the complexities of share spaces:

- When possible, establish separate work areas.
- Have a rotating schedule between the adults to "watch" the kids.
- Create spaces for the children so that they are occupied in their own space while you're working.
- Post your schedules on the refrigerator, or somewhere easily accessible by all family members, so that everyone knows who is doing what and when, and when "do not disturb" status is needed.
- Inject a little fun and creativity by having your kids create a "do not disturb" sign for you to hang on your chair or office door.
- You may find it's necessary to work during "off hours" (i.e., after the kids go to bed) in order to get your daily work done. If that's the case, be sure to update your calendar and schedule and let your manager/co-workers know.
- Establish clearly defined "play time" with your kids (and spouse) and build it into your schedule.
- Don't forget to take care of yourself! Self-care is important, especially critical during stressful and uncertain times. Drink plenty of water, eat healthy, meditate, listen to music, dance, take walks, etc. — whatever helps you maintain your sense of calm and sanity when everything feels out of your control.



Conclusion

Remote work is here to stay. And thanks to advancements in technology, working remotely in the tax and accounting profession is easier than ever. By taking critical steps such as establishing a strong infrastructure, nurturing the right work-from-home culture, and ensuring associates maintain a healthy work-life balance, you can set your firm on the path to success.

Select a workflow solution that offers robust data sharing, project management, document management, and client collaboration functionality that works just as well from the office as when you and your staff are working from home. And always remember that you're not alone. To help ensure that your team has the right tools and resources in place to work successfully anytime, from anywhere, turn to Thomson Reuters®. Thomson Reuters can provide your firm a wide range of innovative solutions to help ensure that your staff maintains efficiency and productivity whether working in the office or remotely.

Recommended products

AdvanceFlow

Thomson Reuters® AdvanceFlow is the first cloud-based audit engagement software that combines the convenience of the cloud with enterprise-level processing power. Engagements, workpapers, and colleagues are available in real time, whether you're in the office, in the field, or anywhere else. It's a new level of convenience — backed by the auditing tools and trial balance power to handle the most complex clients and the most data-heavy jobs.

Checkpoint Engage

In a constantly changing landscape of accounting standard updates, there's a new way to achieve the efficiency, accuracy, and consistency you need to manage your audit and accounting engagements. **Checkpoint® Engage** is the only fully integrated preparation, compilation, review, and audit solution built by your trusted global technology partner with its own world-wide footprint of developers, data scientists, innovation labs, and robust application ecosystem. Leveraging a truly web-native environment will ensure staff access and collaboration from anywhere, anytime and completely eliminate version control worries.

Confirmation

Confirming financial data is all about finding truth, and truth should be easy to find. But for auditors, bankers, lawyers, and credit managers, it's often difficult. We're auditors. We get it. That's why we built **Confirmation**. Our platform is the choice for easy validation of financial and other sensitive data. Trusted confirmations. Everywhere. Every time. 1.5 million auditors, bankers, and financial professionals around the world trust Confirmation to validate data and identify fraud.

GoFileRoom

It's time to banish paper files and storage fees. Thomson Reuters **GoFileRoom** is cloud-based electronic document storage software designed for tax and accounting professionals. GoFileRoom offers an arsenal of features to give your firm 24/7 access to document storage in the cloud. Your staff can quickly associate client documents to workflows while uploading files to the web-based DMS. Streamline your processes and create a truly paperless office. Plus, integrate GoFileRoom with other products to save even more time and money.

AuditWatch

The recognized leader in productivity, **AuditWatch** serves the profession by providing technical and professional training to master your specialization and leading experts to partner with firms. AuditWatch is available in three delivery options: public seminars, in-house seminars, and customized training. AuditWatch also offers consulting, customized course development, and more. Public live seminars offer open enrollment while on-site, firm-specific seminars and customized training for professionals are tailored to meet your firm's development needs. Customized webinars are also available.

Checkpoint Edge

Trusted by 200,000 users, **Checkpoint Edge** is the next generation of our Checkpoint research and guidance tool for tax and accounting professionals. It delivers the latest in artificial intelligence, cognitive computing, and machine learning technologies, combined with the tax and accounting expertise of our editorial staff. It enables you to find fast, accurate answers with a more fluid and intuitive user experience.