



Guide

# An intro to data entry automation

Learn how you can easily introduce accounting automation technology to your everyday processes, revolutionising your work. As a result, you save time and costs—and delight clients even more.

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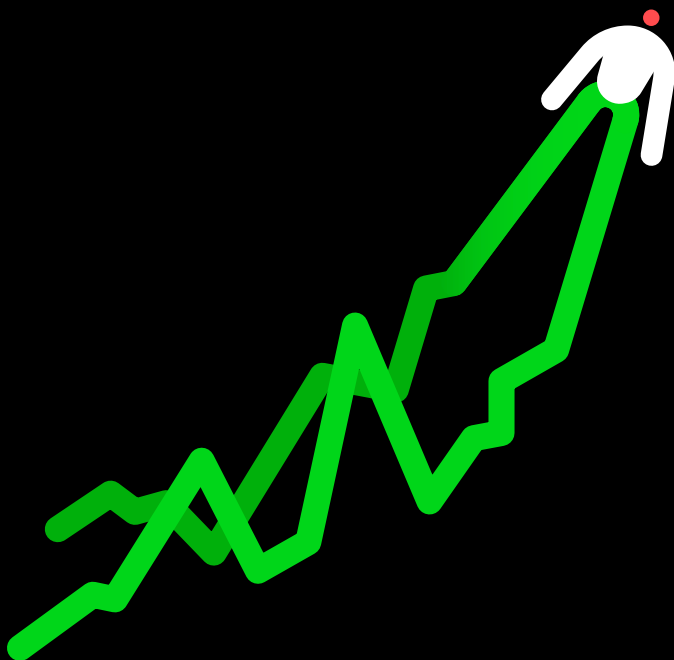
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# Introduction

Automation has made the journey from an industry buzzword to becoming essential everyday technology. For accounting professionals around the world, it's become a vital part of their work-day setup.

This is nothing new. Technology has continually redefined the accounting profession over the last one hundred years, as the timeline below proves.

Automation is simply the logical endpoint of this.

With the increasing digitisation of taxes—such as Making Tax Digital in the UK—this situation is unlikely to change. Automation is here to stay.

This useful guide, created by the data-entry automation experts at AutoEntry by Sage, looks at all aspects of introducing automation into your accounting processes.

This includes the vital first steps needed to implement the technology but also lesser-understood challenges, such as convincing busy colleagues that automation can revolutionise what they do, too.

And because automation works best for accounting professionals when clients use it, we look at that aspect in depth.

**In short, this guide is a one-stop shop for all those interested in how automation can revolutionise the work they do.**



# What are the key benefits of automation?

Let's start by listing just some of the benefits of automation for accounting professionals. These might be already well known. But some are less obvious—and it's often these less obvious benefits that deliver the most revolutionary changes.

## 1. Instant results

We all know about the client that expects miracles—who emails at 5pm on 31 January requesting you complete their Self Assessment return.

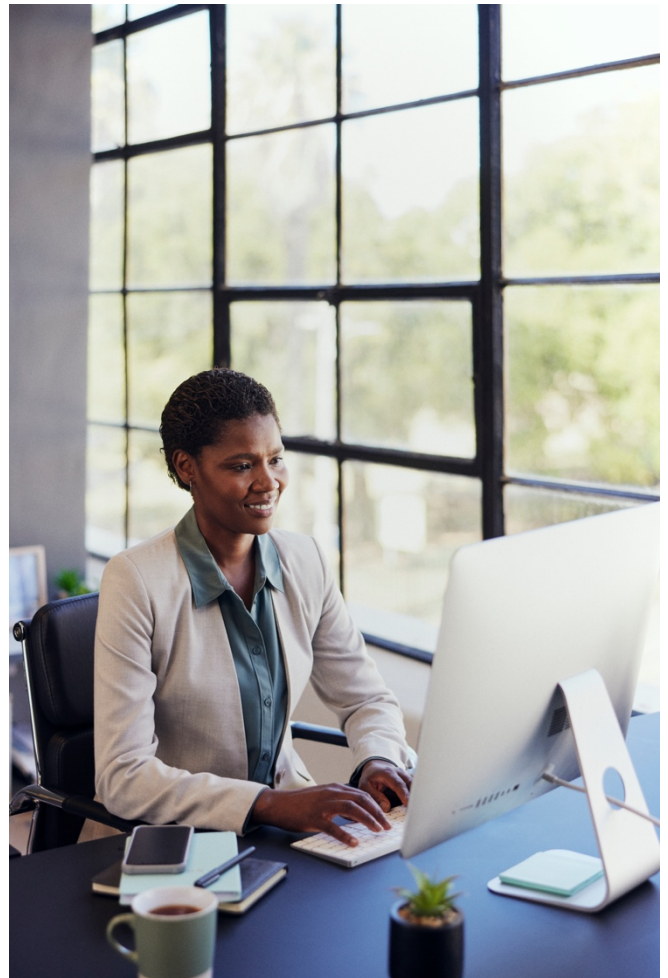
What if you were actually able to perform that miracle?

People often talk about how automation delivers efficiency, but they don't talk about what that means: being able to get back to a client in record time with actionable results.

Get the client to photograph their paperwork, like receipts, and then get them to forward via email any PDF invoices, bills and purchase orders. Then feed it all into AutoEntry.

The data is extracted automatically and accurately. The result is reducing to hours a task that formerly might've taken a day or more.

For clients, this kind of result really does seem like magic. But you're also freeing up time to add value



for the client, either as part of the existing service offering or by offering something extra. You can use the time to discuss and prepare cash flow forecasts, for example.

Or you can spend the time educating them about making timely requests for accounting assistance!

## 2. Getting a feel for the numbers

With the constant flow of data provided by automation tools like AutoEntry, you and your client are much more likely to know what's going on at any given moment.

The days of a client only understanding their financial position monthly, quarterly or even yearly can be banished to the dark ages. And rightly so.

But for an accountant, there's more to it than even this. You can bring your experience and knowledge to bear on the financials.

In short, you can get a feel for the numbers.

You'll be able to intuitively see, without a great



deal of exploration, whether a business is healthy or otherwise. You can see opportunities. And if you suspect there's an issue, the information you require is ready and waiting for you to dig into.

Again, this empowers superior client service along with the potential for increased and improved service offerings.

### 3. Relationship building

Have you ever had a client take an interest in exactly how you do their accounting?

Maybe one or two do, but let's be honest—it's rare.

Clients don't care about how you do the work for them.

But the one thing they do really care about is your relationship with them.

They might not even be aware of this, but they need to trust and believe in you. They need peace of mind.

From your perspective as an accountant, ticking these boxes isn't simply about doing an excellent job. It's a base requirement in any attempt to sell added or enhanced service offerings.

If clients trust you, then this will not be seen as an upsell. It'll be seen as an essential requirement for them to achieve their goals.

Automation like AutoEntry is a shortcut to building this level of trust. Aside from delivering speed and accuracy that clients expect and appreciate, and which present your services in the absolute best light, it frees-up time for you to invest in those client relationships.

Conversations can move away from demands for things like paperwork to discussions about business growth and how you can help, as one example.

Or you can move on to suggesting periodic financial check-up services or the kind of reporting services required before capital investments or financing applications.

### 4. Getting started with accounting automation

We'll dig down into the details of how to get started introducing automation in your practice later in this guide. But here are some steps you might want to undertake right now.

1. **Ask around for the experience of others.** Speak to colleagues or even people in other practices who've started their automation journey. It's tempting to discuss the technical details of their implementation, but instead, try to learn about their experiences—how have things changed and improved for them? Considering this, is there any way they would've done it differently?
2. **Consider your processes.** Start to think about how you and possibly your colleagues complete your day-to-day tasks. Where might automation be implemented to make improvements? Again, consider the broader picture—are there any colleagues who might require additional time and training investments to get the best out of automation?
3. **Try it yourself.** It's possible to get a free trial of automation tools like AutoEntry, so why not give it a try for your personal business-related accounting? If nothing else, this supplies vital experience that you can rely upon when it comes time to sell automation to your wider practice and even to clients.

# How can I become an automation advocate?

In this chapter, we look at what is perhaps the very first step when implementing automation in a practice: introducing the concept in a way that will move the project forward.

This takes more skill and forethought than you might realise!

## **Taking the automation message to colleagues**

You've done your homework and followed the three steps discussed in the previous chapter: You've spoken to other people already using automation in their work, you've considered how your own processes can be revolutionised, and you might even have given automation a trial with your personal business finances.

You're a convert. Now all you need to do is convince colleagues of the benefits!

Surely all you have to do is explain all this to them? Maybe you can prepare a PowerPoint presentation and grab 30 minutes of their time?

Hold your horses!

An awesome fact of life nowadays is that there are many technologies vying for our attention. Sadly, this has led to what we might call "recommendation fatigue", which is to say, we tend to be sceptical when people suggest something new—no matter how amazing. And that scepticism tends



to increase proportionally to any evangelism displayed by the individual!

This is on top of our natural Luddite tendencies and the fact that most of us dislike and even resent changing our working practices.

If the existing way of doing things works, why change it?

That's a good question. Let's answer it.

## **Start small, work big**

You need to prove that automation can make a difference.

It's tempting to try and apply it to everything all at once. But that's the wrong way forward because it's going to generate bad feelings when people feel like they're forced to change.

You need to prove to people that automation will benefit them. And this is actually quite easy to do.

Start small. Choose a task nobody likes. For

example, when it comes to automating data entry with a tool like AutoEntry, if a colleague is working through a stack of client bank statements, ask if you can take a handful of them.

You can then use a tool like AutoEntry to get the data into the system in a fraction of the time it takes your colleague, and very probably more accurately, to boot.

Once done, all you have to do is go and tell the colleague you've finished.

It's as simple as that.

Automation sells itself. You don't need to. Even if that individual sitting on the pile of bank statements is the most curmudgeonly Luddite in the history of the accounting profession, they will not be able to resist asking how you did it. The alternative is to carry on doing the drudge work. And nobody wants that.

Offer to do more work, or other kinds of paperwork, like capturing receipt or invoice data.

### **Collecting the evidence**

Accountants and bookkeepers care about the numbers. It's right there in the job description!

And while selling automation to colleagues is a matter of showing it in action, there is one more step: you will have to measure time savings and perhaps accuracy improvements too when it comes to automating data entry.

This is where you can finally and optionally create that presentation, or at least an Excel spreadsheet.

What you create can be a mix of qualitative and quantitative data—but it's advisable to lean more on the quantitative.

In other words, let the measurable results sell the technology.

What kind of results are we talking about when it comes to AutoEntry's automated data entry?

Here are some examples.

The Irish Farms Accounts Co-operative reports that, "in many cases, four hours of data entry was reduced to four to five minutes."

In terms of accuracy, fresh fruit business The Fruit People said: "Providing the document is clear enough to be read properly, the number of mistakes becomes negligible."

Aim to provide this level of clear insight to colleagues.

### **All projects need an owner and/or manager**

When the time comes that the business decides to invest in automation, it needs to be done in a structured and orderly way.

It needs to be a project, and that project needs an owner and/or manager. This might be you, or it might be somebody else in the business more experienced in rolling out changes to processes (and you will certainly need to have allies).

In addition to creating a rollout plan covering ideally a six or twelve-month period, the owner or manager of the project needs to create key performance indicators (KPIs), and measure against these.

Adjustments might need to be made down the line. This is perfectly okay and is to be expected.

The project may have separate phases with separate owners/managers.

For example, you may decide to roll out automation within your practice initially. Phase two might then be to roll out automation amongst clients. This might be radically different in terms of requirements because you could choose to partner with software vendors in addition to simply improving client data flows to make life easier for both you and them.

# How do I start automating in accountancy?

In this third chapter, we look at some pragmatic steps needed for implementing automation within an accountancy practice of any size—from just a handful of partners up to a busy practice that might struggle to spare the time to change processes.

## Choosing where to start with automation

There's many areas of an accountant's workflow that can be automated. As just some examples, it can be applied to:

- New client acquisition, including preparing proposals and engagement letters.
- Ongoing project and task management, including reminders of crucial dates.
- Data entry, including the goal of abolishing paperwork (as much as possible).

Some of this can be applied by clients, too, which can create efficiencies for the accountant further down the line.

But while always looking for areas to improve and automate is a good thing, an accountancy practice is unlikely to succeed if it attempts to tackle every pain point at the same time with automation.

So, how do you choose where to start?

One way to examine it is through a technological lens. What tech are you currently using, and how



might it be augmented with easy automation?

In other words, don't aim to reinvent the wheel. Aim to improve what you're already doing in an evolutionary way.

Explore your accounting software's app store, for example, for new integrations. Any technology should integrate fully with what you already have, so check to make sure.

Another focus area is bang for your buck. How much time or other resources will be saved by implementing automation? Surely those that save the most time should be your first port of call?

Finally, don't forget when looking at automation that the goal isn't to remove client contact points.

For example, automating proposals and onboarding of new clients saves considerable time and effort. But clients still need a personal touch. Indeed, this will probably be your own expectation. Ensure this is built into any new process.



## Creating an accounting automation project

Projects are more than a list of items that need to be done.

Changes you expect to achieve by implementing the project will need to be detailed, and this should lead directly to the creation of milestones and key performance indicators (KPIs).

Some project management methodologies define client and contractor roles, and while this might sound absurd when implementing automation within your own team, borrowing this structure makes more sense than it might seem. You can take on the role of a consultant who's brought in to implement the technology. Creating this distance between business-as-usual and the changes you seek to make can be useful in creating perspective.

None of this is to say that the project needs to be complicated or on a large scale. Feasibly, it could all be managed by one individual. But as we've already discussed in an earlier chapter, getting buy-in from colleagues is necessary because automation is likely to affect their processes.

The project could involve separate phases. For example, if you're automating data entry with a tool like AutoEntry then phase one might be implementation within your own team and processes. Phase two might be taking this out to clients and implementing automation amongst those who are receptive to technology improving their processes. Phase three could be introducing automated data entry as an onboarding option with all new clients.

All this requires some degree of planning. One thing is certain: a try-it-and-see approach rarely succeeds when it comes to revolutionising working processes across a business.

### Making use of support

Put simply, there's no need to go it alone.

If you're implementing a widely-used solution then there's likely to be a significant amount of support—everything from helplines and documentation provided by the vendor to forum discussions used more informally by users seeking to address common issues.

If you know of anybody else who's implemented the automation technology then, obviously, now's the time to put their number on speed dial!

There's a whole body of experience out there, so ensure you make use of it.

One option to be considered early on is to use a third party to help you implement automation. These teams bring expertise and experience, and thus can make for a quicker process from start to finish. They will have encountered every problem or issue before and will have the solution at hand.

As with any kind of external service, a third party might involve upfront expenses but is very likely to save money in terms of time saved further down the line. They're also more likely to do a good job, with less potential for failure, and are more likely to create lasting structures that will endure.

### Setting expectations and being prepared

Any automation you introduce can succeed only if it fits with your existing skills, organisation and processes.

Furthermore, it must align with whatever business model you may have now—and in the future.

With the time freed up by automation, your practice may wish to examine added service offerings, such as outsourced bookkeeping and even finance director roles—something which is coming into focus with the rush towards MTD ITSA and the increased record-keeping requirements for businesses.

In other words, whatever automation is introduced must be aligned with this direction of travel. This might involve planning beyond merely automating processes and could affect or even inspire bigger discussions.

On a more practical level, you'll need to ensure costs and time are set aside for things like training. There may need to be extra effort put into meetings to discuss the changes with staff.

If the changes impact clients then this also needs to be factored in. Even if the changes are positive, clients may resent the sudden introduction of a different way of working or different expectations from you.

# AutoEntry by Sage: automating data entry

AutoEntry by Sage is the market-leading data entry Automation tool trusted by hundreds of thousands of accounting professionals daily. Here's what you need to know.

AutoEntry means you can say goodbye to manual data entry with a three-step procedure that takes minutes. This can reduce what was once days of data entry work to mere hours.

AutoEntry allows you to capture, categorise and publish your financial documents through to your accounts software such as Sage, Xero, QuickBooks and others.

## 1. How to automate data extraction

AutoEntry allows for multiple ways of submitting data for extraction: from simply uploading a document to the AutoEntry website to taking a picture via the mobile app, utilising the unique email addresses or using the fetching module.

AutoEntry can accurately extract data from receipts, invoices, bills, expenses, supplier statements and bank statements.

### Upload

Simply upload documents to AutoEntry by



selecting a document from your File Manager, or drag and drop files from your computer.

The upload option is available for all types of document—receipts, invoices, bills, expenses, supplier statements and bank statements.

### Email

Get documents sent to your email address? Easily forward these files to the unique email addresses assigned to your account. AutoEntry does the rest!

You can also share the unique email addresses with your suppliers, and they can send your invoices or supplier statements directly to AutoEntry.

### Mobile app

The mobile app is the simplest way of getting documents into AutoEntry! Have an invoice, receipt or an expense in paper format in front of you? Simply take a picture and it will be sent directly to your AutoEntry account for extraction.

### Fetching

With Fetching, you can simply link your supplier

account with AutoEntry, and it will fetch supplier and bank documents as soon as they become available in your accounts.

## 2. How to categorise data

Now that all your relevant documents are within AutoEntry, all you have to do is categorise them and they will be ready to be published through to your accounting software, or they will be available for download in an export format suitable to you.

Once your AutoEntry account is connected to your accounting software, we will pull in all of the supplier and customer accounts, your VAT codes and the Chart of Accounts.

Categorise the documents available within AutoEntry as you wish, and teach AutoEntry 'rules' so you don't have to do it again.

### Auto-suggested suppliers

If you have yet to teach AutoEntry 'rules', AutoEntry will make a smart suggestion for a supplier account, based on the accounts pulled in from your accounting software, or manually uploaded by you. If you agree with the suggestion, this can be taught to AutoEntry, and it becomes a 'rule'.

Little moments of intuition will make your use of AutoEntry smoother, faster and more accurate.

### Auto-suggested VAT codes

Similarly, as with auto-suggested suppliers, if you have yet to teach AutoEntry 'rules', AutoEntry will make an educated suggestion of a VAT code that should be assigned to the extracted document, and if you are satisfied with the suggestion, it becomes a 'rule' and you won't have to categorise the document in the future.

### Rules

Once you have categorised a document once, you can teach this as a 'rule' to AutoEntry, meaning the same categorisation can be applied to the document by AutoEntry each subsequent time, without any human intervention.

You can teach AutoEntry multiple 'rules' to allow AutoEntry to become smarter, and it will remember each 'rule' that you have set.

## 3. How to publish to accounting software

So, you've uploaded the document to AutoEntry, AutoEntry has extracted the data, you have categorised the documents as you wish, and taught AutoEntry a 'rule' or two.

Now you are ready to either send the documents through to your accounting software or export the documents in a format best suited to you.

### Publish

AutoEntry connects with just about any leading accounting software and makes it really simple to send the data over by clicking the 'Publish' button.

### Auto-Publish

Now that you have taught AutoEntry 'rules' of how you would like your documents to be categorised every subsequent time in the future, you can also teach AutoEntry to automatically publish the document to your accounting software. This means that the only thing you have to do is upload the document to AutoEntry. It will do the rest.

## AutoEntry for accounting professionals

For accountants and bookkeepers, AutoEntry should be considered a near-mandatory tool with a host of key benefits you'll experience every single day:

- **Taking the drudgery out of data:** AutoEntry takes most of the labour out of data entry, freeing you for other work.
- **Improved relationships with clients:** Spend less time getting to trial balance and more time sharing your knowledge and insights.
- **Smart Analysis:** AutoEntry remembers key details for ongoing work, including supplier account, and nominal and tax codes you assign.
- **Automatic Publishing:** AutoEntry will seamlessly and automatically publish on just about any accounting software.

Put simply, using AutoEntry leads to better conversations.

With less time spent on data entry and chasing documents, you'll have more time to focus on analysis and client relationships.

Real-time data will help you catch good or bad news for your clients early on, whether that's misfiling, good opportunities or something else.

# What else can be automated in accounting?

In this fifth chapter of this guide, we look at how the automation journey can continue beyond the mere essentials. How much of the work you do as an accountant can be automated?

## **Automating accounts payable**

We've come a long way since the days when digitising your accounting merely meant an electronic version of your ledgers.

Making use of automated features within your accounting software is one of the lowest-hanging fruits when it comes to accounting.

### **—What's the technology?**

Modern cloud accounting software lets you connect to your bank, so that there's a constant feed of transactions. This means always having accurate, up-to-the-minute data.

These transactions can then be reconciled against your accounts payable, so that you always have an equally up-to-date view of the cash flow.

Even better, you can automate this using bank rules—criteria you define and that are applied to incoming bank transactions. For example, a rule



might say that £300 received from a certain bank account number should always match an invoice for £300 sent to a business you know to use that account.

Rules can be reused across businesses and, if you're an accountant, across many different clients.

### **—What's it used for?**

- Dramatically speeding up periodic bank reconciliation.
- Always ensuring there's knowledge of the true cash flow situation.

## **Smart assistants/chatbots**

Given that perhaps 50% of queries directed to accountants from clients are on the same topics, efforts have been made to add in some automation.

Enter the world of the chatbot, perhaps more accurately described as the smart assistant.



### —What's the technology?

Smart assistants aim to let people use natural language queries to achieve tasks. When they work well, it should be just like asking a human to do something or to answer a question.

There are many distinct kinds of smart assistant. At the more sophisticated end of the spectrum are tools on our mobile phones, such as Apple's Siri or Google Assistant.

Google's experiment LaMDA (Language Model for Dialogue Applications) is an example of what we'll be using in just a few years' time and was recently mired in controversy when one of Google's own engineers suggested LaMDA might've achieved sentience (it hadn't—it's just very, very good at pretending to be human).

Several experiments have taken place using smart assistants in the world of accounting. Sage offers a smart assistant across some of its products, like Sage Intacct. Initially named Pegg, this allows users to easily input queries such as checking their ledger balance, or making a note of purchases,

In the US, AskyMyUncleSam allowed people to type tax queries into a chatbot window and get instant replies.

Arguably the most use of chatbots/smart assistants has been in marketing, where they can be used as the first line for client engagement. Several services allow you to easily create chatbots for use on websites, within chat windows, or to be deployed within instant messaging services such as Facebook Messenger.

It's still early days for chatbots/smart assistants in the world of accounting, but this remains a very promising and interesting area that could be revolutionary.

### —What's it used for?

- The first line of response for client engagement on websites and social media.
- Easy access to accounting details without a knowledge of how accounting software works, or even the technicalities of accounting, such as what ledgers are.

### Automating bill collection

Getting money from clients can be a pain.

Client payments are typically due once certain dates have passed (e.g. compliance work done prior to 31 January) and are usually for smaller fixed amounts that the client is aware of ahead of time.

If all the details are known ahead of time, and the time/date can be predicted, this is something ripe for automating.

### —What's the technology?

You will already be aware of the tool we're talking about: Direct Debit.

For example, if you charge £250 for preparing a basic Self Assessment tax return, then requiring the client to sign-up for a Direct Debit for that amount, to be taken on 1 February each year, is hard to argue with.

Similarly, quarterly fees for preparing VAT returns can be scheduled in an identical way.

If you've looked into this in the past then you may have been put off by the extensive rules and regulations required to get the all-important AUDDIS (Automated Direct Debit Instruction Service) status with your bank.

However, online services like GoCardless make it significantly easier to manage. Yes, there's a charge, but this will be far less cost than wasted time chasing payments—and you can protect your cash flow at the same time.

Such services even feature widgets you can implement on your website that collect the required details and mandate as part of your client onboarding process.

You'll still need to be aware of some rules, such as the requirement to notify customers before each Direct Debit is taken. But, again, this can be automated via automatic bill delivery.

### —What's it used for?

- Promptly collecting regular payments—even if the amount of the payment varies.
- Keeping cash flow humming along without the need to check things too often.

### Automating everything else!

Many accountants use Visual Basic for Applications (VBA) within Microsoft Excel. Sometimes referred to as macros, these snippets of code are typically used to manage and manipulate spreadsheet data.

Less well-known is something that's effectively Microsoft's cloud-enabled version of VBA—Microsoft Power Automate.

Put simply, if data exists online then you can probably automate the processing of it in some fashion using Power Automate.

### —What's the technology?

Power Automate lets you “streamline repetitive tasks and paperless processes” (to quote Microsoft directly).

In other words, it's again about managing data but on a much wider stage compared to VBA. This includes data within files, and pretty much anywhere data can be found online. Power Automate also works anywhere Microsoft technology is found, including Office 365 applications in the cloud.

The technology's original name was Microsoft Flow, and this indicates how you create the automation. It's all about getting one thing to happen after something else, and this is typically done by clicking and dragging actions into something akin to a flowchart. Apps and data sources are connected together, so the output of one flows into the next.

If this all sounds too complicated, then comparing it to a similar service called If This Then That (IFTTT) might help explain the fundamental principle—you configure it to do one or more things once something else occurs.

### —What's it used for?

- Scheduling tasks, such as the creation of regular reports that grab the latest data from various places.
- Processing files when they appear at a given location (e.g. OneDrive folder or email)—such as getting a notification or even extracting data from the document and inserting it elsewhere.

# How do I sell the benefits of automation to clients?

Getting clients to automate as much as possible of their accounting processes is vital. This creates additional time savings and efficiencies that really can benefit your firm's bottom line. It's even possible to earn added revenue via the partner programmes offered by automation software vendors such as AutoEntry.

Here's some ways to put that into practice.

## **Why should clients automate?**

From your perspective, getting clients to automate means that the data you need for their accounting arrives at your office in the best possible form.

For example, if the client uses AutoEntry to scan a receipt after buying supplies then, when the data arrives at your office, you can be certain of the following:

1. You know it's a receipt, and not some other kind of paperwork.
2. The line-level data has been extracted and identified (e.g. cost, supplier, VAT point). Rules might also be used to categorise it ready for publishing through to accounting software, saving even more time.
3. The data is in digital form, ready to continue its digital journey. This is vital for Making Tax Digital in its various forms.



Unsurprisingly, from a client's perspective, the reasons they should automate are broadly the same as yours. It saves time. It makes life easier. It eliminates the drudge work that nobody enjoys.

But there is, of course, a significant difference. While working on accounting is how you make money, that situation is inverted for the client.

While they're taking care of admin, your client isn't earning anything.

Even worse, they're effectively losing money because every hour spent on admin is an hour they could be working for clients or customers. It's for this reason that many clients put off admin work until the weekend, which adds to their stress levels (not least when the weekend is a blur of family activity and they aren't able to touch their P&L!).

So, in many ways, automating admin is even more vital than it is for accountants. It really can be easily quantified in terms of cost, in that spending £20 a month on automation software can save maybe 10 hours of admin work—hours in which the

client can be out there amongst customers earning many, many multiples of that £20.

### **Encouraging automation amongst clients**

So, you'd think it would be easy getting clients to embrace automation, right?

This is the hard part.

You might educate clients about why automation will make their life easier. You might provide them with the software and train them on how to use it. The new process required may be incredibly easy, too.

However, getting clients to automate manual tasks each and every time can be impossible.

The issue revolves around the perceived importance of automation, and a handful of tricks can be used to combat this. Here are some suggestions.

#### **1. Communicate and refresh**

Once you've explained how to use the automation software and process, don't leave it there. Follow-up with the client. Ask if they need any further help or training to use the software. Ask how they're getting on with it, and if you can help adjust any of their processes to make better use of it. In short, make automation a part of your client relationship and ongoing service offering.

#### **2. Provide reporting based on what the automated data says**

Essentially, the goal here is to help the client see the value and to avoid making it seem to them as if they're sending data into a black hole.

Let them see that data entry automation results in a 24/7 accurate cash flow dashboard in their accounting software, for example.

Use this data to help them make decisions, such as capital purchases or plans for growth. Of course, this can all fit with any ongoing work around improved service offerings of this nature within your practice, such as periodic financial check-ups.

#### **3. Build it into a wider automation project for the client**

Any automation you request of the client is likely to work better if it's part of a wider implementation project for the client. Data entry automation might just be one part of it (albeit the most useful and the

one most likely to show instant useful results).

The client can use their accounting software to automate accounts payable and bank reconciliation, for example. They can use tools like customer relationship management software to automate new client/customer acquisition and client/customer onboarding.

You don't have to explain all this to the client. That's outside the scope of what you do, of course! All you have to do is open their eyes to the potential. In doing so you strengthen the work you're doing.

#### **4. Provide a paradigm**

Explain to the client how automation has changed how you do what you do. After all, from the client's perspective, you handle accounting data all day long, so anything that cracks that nut for you is surely powerful enough to help them, too.

Discuss how it benefits other clients, as well, and perhaps provide examples of how your other clients have implemented it. Remember to focus on the *why*, rather than the *how*.

Quote real-world results of automation, such as time saved, rather than making a logical argument for automation. Things are easier to accept if there's clear proof that new systems work.

#### **Marketing opportunities**

Automation isn't just an opportunity to save time and money and make life easier.

It's also a chance to communicate that yours is a modern practice with modern solutions.

Most new businesses today are created by members of the millennial and Gen-Z generations, who've never known a world without advanced technology.

They expect any service they use to be as savvy as them—or even more so.

So, mention automation in client-facing marketing materials. Join partner programmes offered by automation software vendors and display their product graphics, and use any co-branded marketing materials they provide.

Experience also shows that if you're using the same software as clients, then retention rates are improved.



# Conclusion

The next step for accountants is here in the form of automation. It's the only way to remain relevant and competitive in a time when taxes are being made digital, and the world of business is fundamentally changing to respond to these different legislative demands.

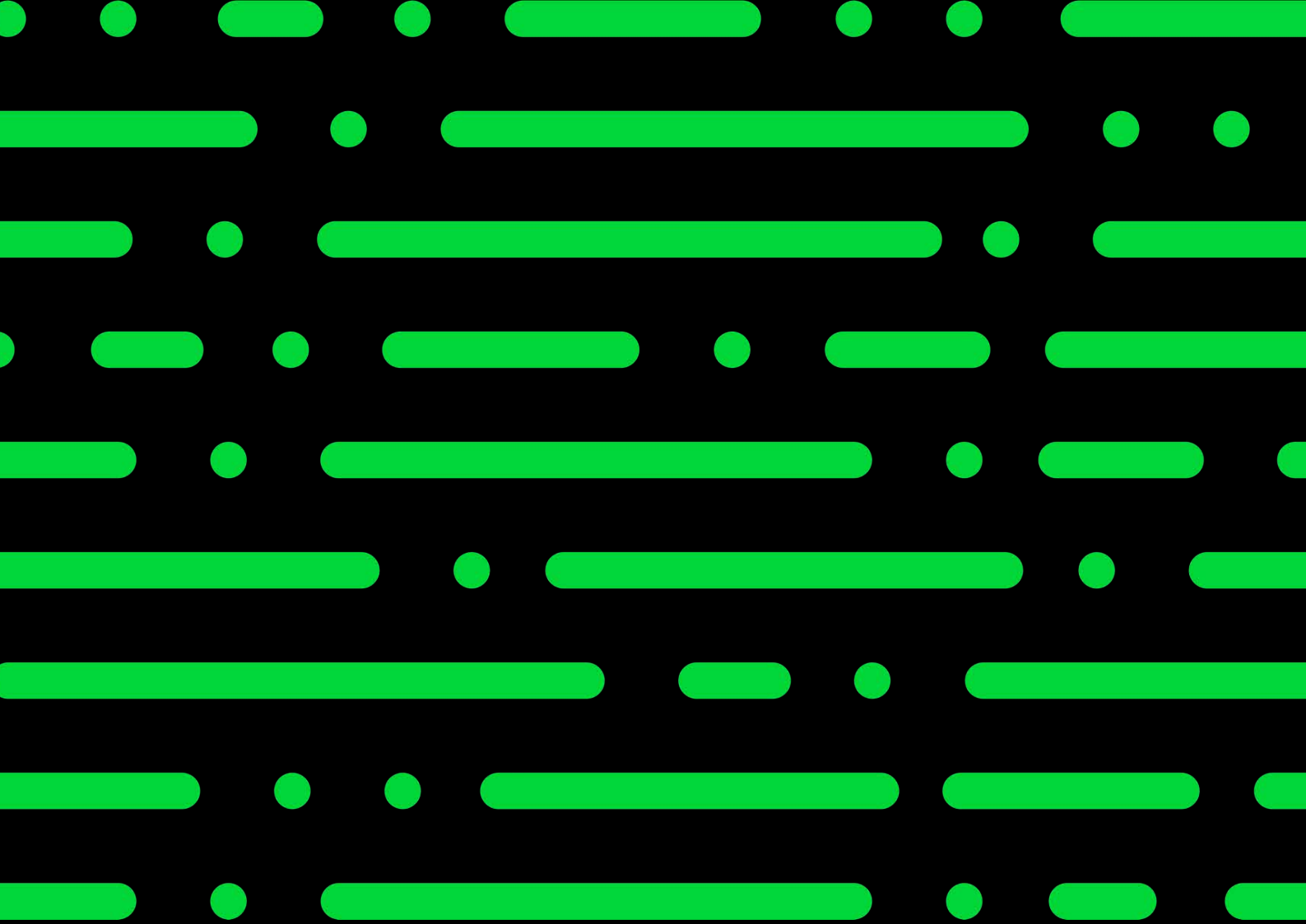
For those willing to embrace it, the benefits of better tech have always been nothing less than game-changing.

In a challenging business environment, it's no exaggeration to say that adopting automation right now could make the difference between a practice that succeeds—and one that falls by the wayside.

But while there may be eager anticipation to start the automation journey in your practice, some forethought and planning can prepare you in the best way possible.

Above all, automation should be considered an ongoing journey. As machine learning and artificial intelligence progress, there are likely to be decades more of improvements to the way we all work. To remain competitive is to keep abreast of such developments.

But the essentials are already here—and must be embraced.



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