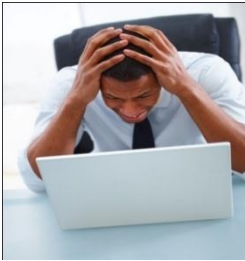


Can't Prioritize Work - Crisis Management



Symptoms (Pain)

Causes (Diagnosis)

Best Practices and Recommendations

AWS Capabilities

- Feeling frantic about what to do first/next
- Crisis Management
- Time spent setting priorities is corrupted by client “emergencies”
- Need additional staff, but have uncertainty about hiring


- Workload exceeds resources
- Last minute demands by clients
- No visibility into practice – due dates, backlog, assignments, etc.
- Can't say “no” with confidence

- Log all commitments immediately
- Review WIP routinely, adjust assignments
- Know your backlog; decide how to respond to new work
- A centralized DB to track all work & tasks, assignments

- Every task and document can be recorded and tracked
- Staff can review assignments, set priorities and update estimated time to complete
- During planning meetings, all tasks can be reviewed and updated
- Dashboard view of work backlog

Prioritize all work with WIP Reports & Dashboards

[AWS Home Screen](#)
[Practice Management Reporting](#)
[Work In Progress](#)



Work In Progress - Company

Refresh

Administrative Tasks	3.50
Business Formation	10.00
Financial & Tax Planning	5.00
Financial Statements	140.50
Accounting & Consulting	2.00
Notices	12.00
Other Filings	6.00
Payroll Checks	43.50
Payroll Taxes	203.25
Tax Returns	18.00
PP Tax Returns	3.00

Tasks Up To Due Date Of **8/8/2012**

During periodic team meetings, time sensitive tasks are reviewed; priorities, assignments, estimated time and due dates are updated in real time.

Overall Total Time = 446.75

Accountants' Workflow Solution

Work In Progress - Company

Client	Module	Due	Pty	Time
Category	Initiated	Status	Assigned To	
All Weather Services, Inc.	Financial Statements		0	0
Year: 2011 Period: QTR 3	<input type="checkbox"/> MI <input type="checkbox"/>		JWH	
All Weather Services, Inc.	Personal Property Tax Returns		0	1
Year: 2010 Form: 1040	12/29/2011 <input type="checkbox"/> MI <input type="checkbox"/>		DE1	