



Underutilization of Staff

Symptoms (Pain)

- Unsure of what staff is working on – billable, non-billable, productive?
- Billable hours are too low
- Working long hours and still have to worry about cash flow

Causes (Diagnosis)

- Process and system inefficiencies
- No way to track, view or control mix of staff assignments
- Unforeseen circumstances requiring more time than expected to complete the work that isn't billed

Best Practices and Recommendations

- Be aware of backlog & set priorities
- Log unplanned work and bill it
- Weekly, bill all completed work
- Ability to track assignments & balance workload
- A system that captures all WIP & completed, billable work

AWS Capabilities

- All tasks can be logged, assigned with estimated time & priority
- Work in progress reports to adjust staff assignments
- Practice manager dashboard; a view into current staff assignments and work backlog
- “Completed, Not Billed” reports ensure all work is billed

Prioritize Work with the WIP Report & Dashboard

Tax Returns | Document Management | Client Maintenance

Client Name: All Weather Services, Inc. | Spouse: | Credit Hold:

Tax Year: 2010 | Current Fees: \$900.00 | Extension Requested: | Priority: 1

Tax Form: 1040 | Prior Fees: \$900.00 | Extension Done: | Next Time: 2

PPTR Est Time: 1

Work In Progress - Company | Refresh

Tasks Up To Due Date Of: 9/6/2012

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

Overall Total Time = 46.75

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	MI <input type="checkbox"/>		JWH	
Cooper, James	Notices		0	2
Dependent Care Not Reported - CP 2000	11/2/2011 MI <input type="checkbox"/> Not Started		DE2	
Craft, Mark	Tax Returns		0	2
Year: 2011 Form: 1040	12/20/2011 MI <input checked="" type="checkbox"/>		DE1	