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Lunch and Learn

Webinar Series

Technology and Bridging the Talent Gap

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Today's speakers



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Agenda

- Determine what technology should be implemented into your organization to build your own virtual office and collaboration suite.
- Identify major opportunities and business cases where data sharing and integration would be efficient, effective, and useful for an organization.
- Identify and utilize new apps, websites, and services to gain efficiency in your personal life and better meet organizational needs;
- Define integration and discuss how it can be used inside an organization to improve data sharing and automation.
- Identify the cost and benefits of the various data sharing techniques and approaches to an organization.

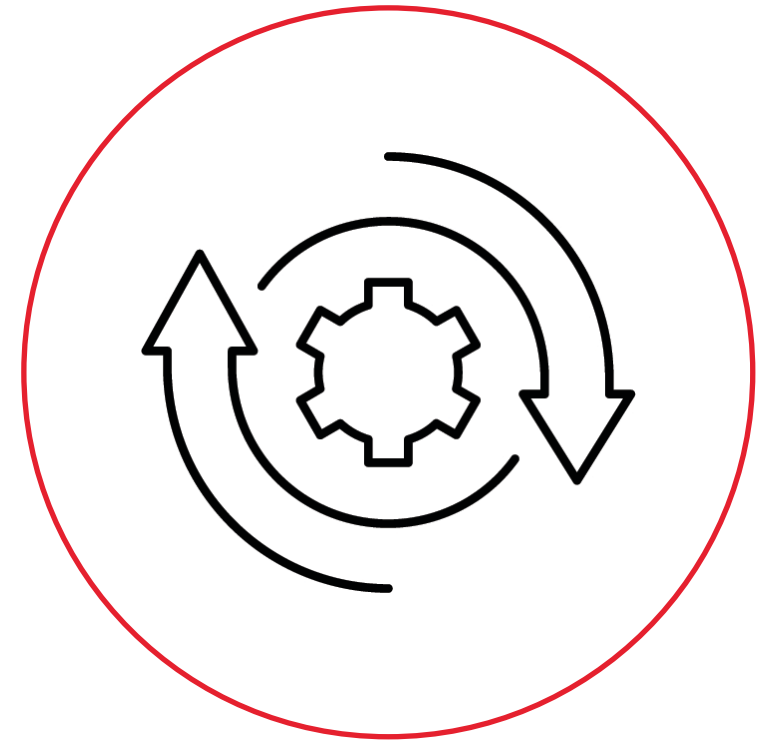
Artificial Intelligence and Automation

While different, these two topics
are intertwined and occur together.



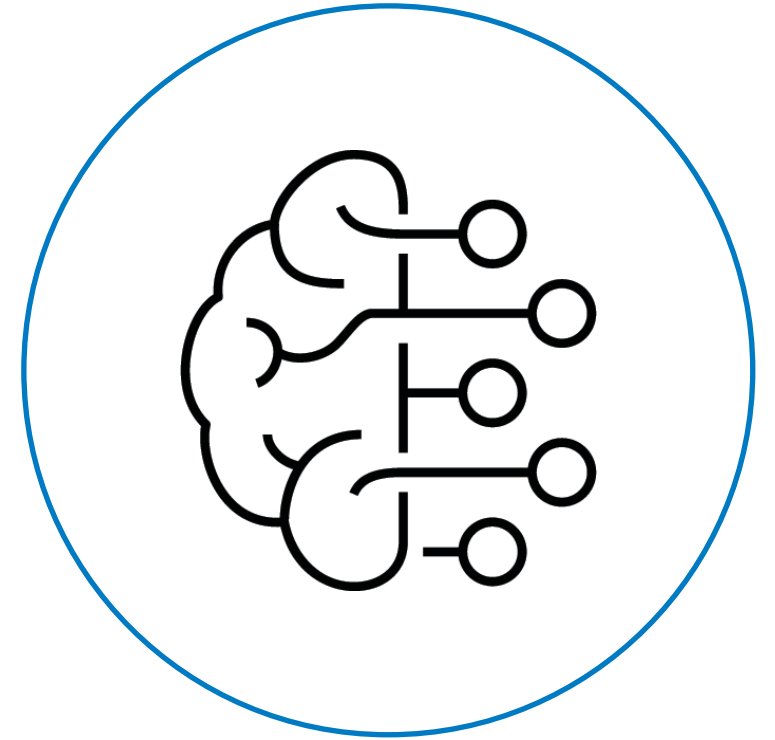
What is Automation?

- In business, automation is focused on the performance of a task without the need for human labor.
- Humans design automation procedures, but the work is performed between systems. Once initiated, it will continuously run on its own until intervention is required.
- An example of simple automation would be the thermostat in your home or fridge. It will maintain the temperature once set.
- A complex automation would be your car's traction control system that automatically adjusts based on multiple real-world conditions.



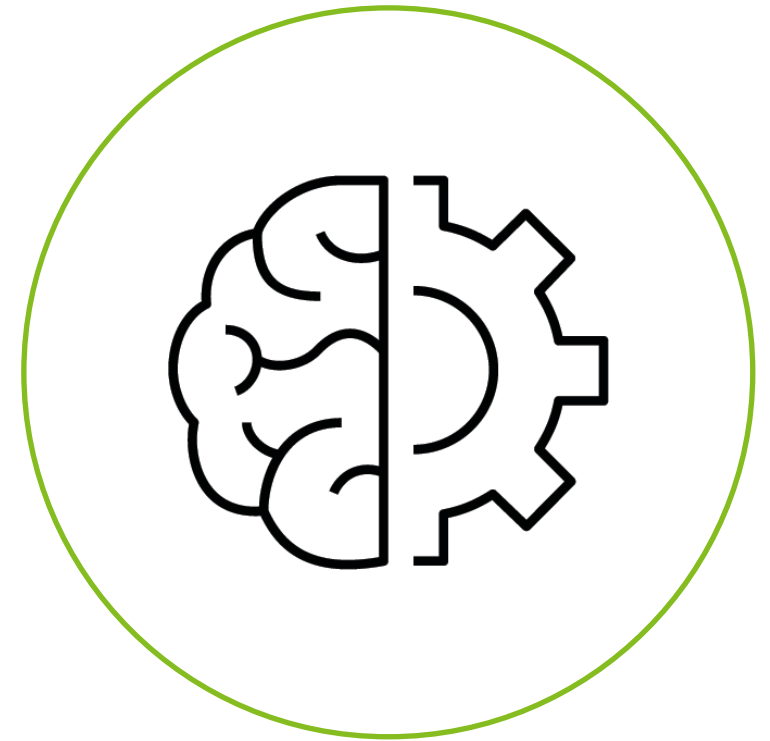
Artificial Intelligence (AI) Defined

- Computer science defines AI research as the study of "intelligent agents": any device that perceives its environment and takes actions that maximize its chance of successfully achieving its goals.
- Colloquially, the term "artificial intelligence" is used to describe machines that mimic "cognitive" functions that humans associate with other human minds, such as "learning" and "problem-solving."



Machine Learning (ML) Defined

- Machine learning is a subset of artificial intelligence.
- ML is focused on allowing programs to *learn* from past data without programming explicitly.
- In short, ML applies historical information when processing today's data without explicit programming.
- Almost all practical and useful examples of AI today are machine learning. While ML might seem complex, many tools and applications use ML every day. We're going to explore some of them today.



Artificial Intelligence vs. Automation



Artificial Intelligence



Automation

	Artificial Intelligence	Automation
Decision Making	AI makes a decision based on the learning from experience & information it receives.	Automation is like preset and self-running to perform specific tasks.
Purpose	AI is a system that helps experts analyze situations and arrive at a particular conclusion.	Automation is a kind of machine programmed to carry out a routine job.
Repetition	AI is for non-repetitive tasks. Each task is separate and distinct from the other tasks	While automation is for repetitive tasks based on commands and rules.
Learning and Changing	AI involves learning and evolving.	Automation does not involve learning and evolving.
Interaction with Humans	AI interacts with humans, and it learns from experience, compares situations, and then works according to it.	Automation can have no interaction with humans. It typically works on instructions.

Learn more at <https://bit.ly/38xLJaZ>

3 Things AI Can Do Right Now

AI can be used today inside your organization.

There are at least three major areas which you can consider using AI in your organization.

- **Process automation.**
Doing “back-office” routine tasks.
- **Cognitive insight.**
Looking at data and interpreting the meaning.
- **Cognitive engagement.**
Working with customers and staff.



AI & Automation in Business

- Automation makes hardware or software that can do things automatically, without human intervention.
- Artificial intelligence is focused on decision-making.
- Automation can occur with or without artificial intelligence. When you use AI, you're also using automation most of the time. The two technologies complement each other well.
- Industrial automation can be done with sensors and basic programming. The automation responds to the output of the sensors. For example, a stoplight.
- Learn more about the differences between AI and automation: <https://bit.ly/3tT836Y>



Polling Question #1



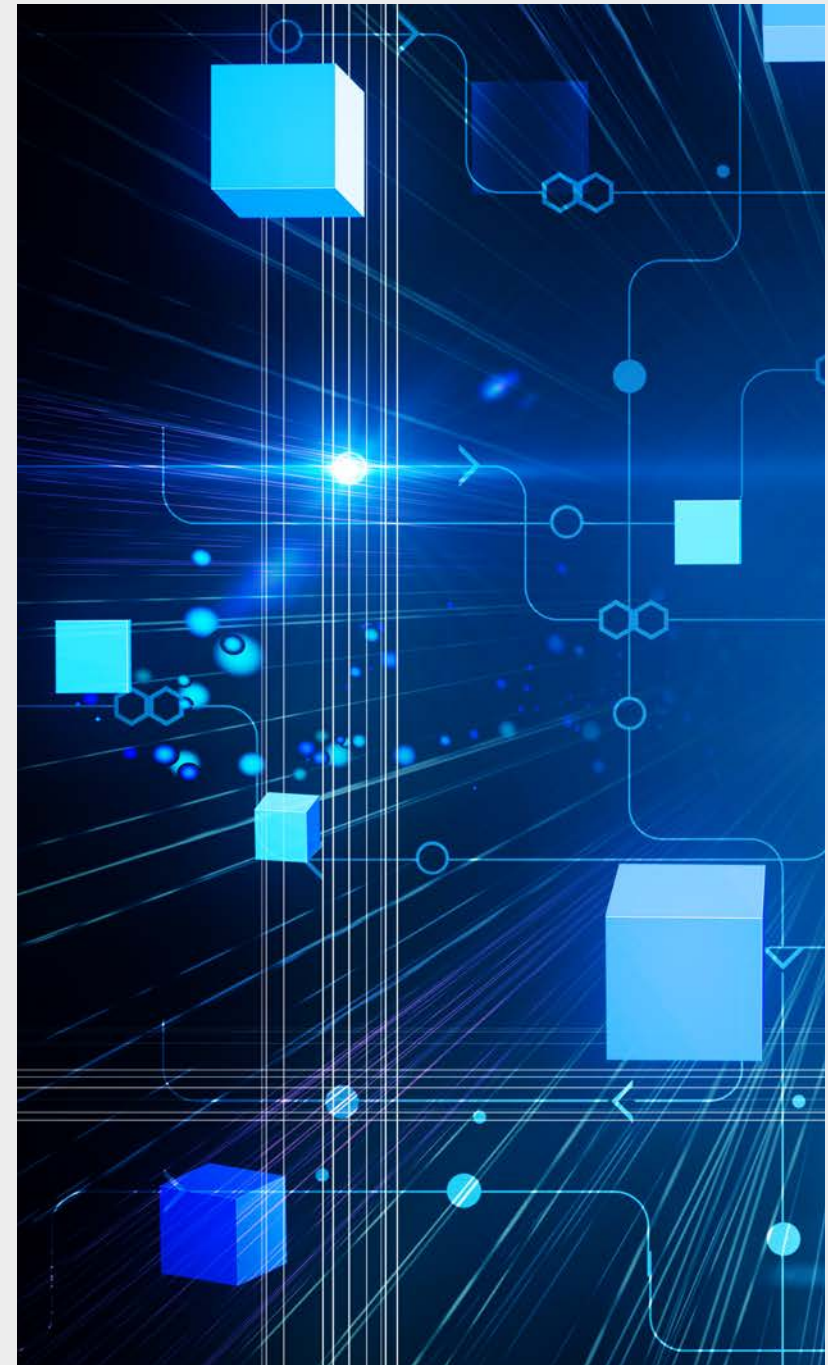
What is the significant distinguishing difference between artificial intelligence and machine learning?

- AI is focused on maximizing the chances of success whereas ML is focused on producing accurate results
- AI is focused on creating systems to solve problems like humans, but ML solves problems like a computer
- AI learns from past behavior, but ML does not
- None of the above

Integration Platform as a Service

Trigger and action workflow tools

- Will have a “trigger” that will initiate a series of actions in other systems.
- Web and app-based integration tools allow for data sharing and integration with minimal technical and coding expertise.
- Virtually all configuration is done on the mobile handset or a webpage using your favorite browser.
- The tool takes care of all the security, authentication, and data management. To you, it’s a black box.
- Great option for simple integration projects, just getting started or exploring options.
- Virtually all the logic and programming needed to connect services are provided to you. No need to learn any programming, but it will help.

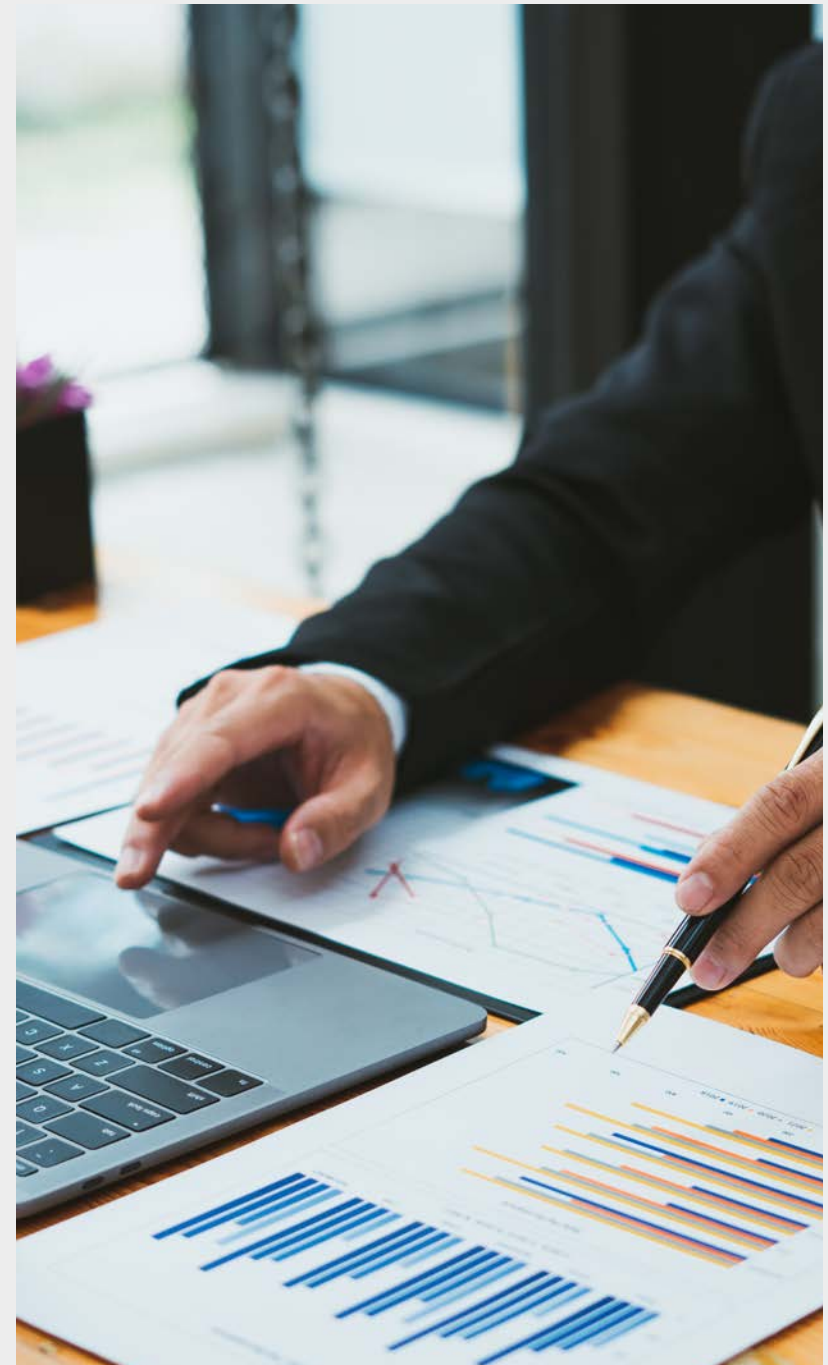


Example Using Accounting System and a CRM

Easily push and pull data between systems

iPaaS tools can be used to automate several routine business functions around the accounting system. For example:

- Trigger, a new customer is created in the accounting system. Action, iPaaS tool creates the customer record in the CRM.
- Trigger, the sales team updated the customer address in the CRM. Action, iPaaS tool updates the customer address in the accounting system.
- Trigger, a new invoice is created in the accounting system. Action, iPaaS tool posts a message in MS Teams to let the sales team know.
- Trigger, an invoice is paid in the accounting system. Action, iPaaS tool updates the customer record showing the invoice as being paid and updates an Excel workbook tracking AR.



Triggers & Actions with iPaaS Tools

Trigger

Accounting System

- Creating of a new customer record
- Customer name, address, email, etc.

Action #1

CRM System

- Create an associated record from the accounting data.

Action #2

Microsoft Teams

- Send channel message to sales and accounting teams.

Action #3

Microsoft Excel

- A row in client spreadsheet with new customer data.

Examples of Triggers and Actions

Triggers

Start the automation workflow

- A new order is placed on your company's e-commerce system.
- A row is updated on a commonly used spreadsheet.
- An email is received in your inbox.
- A new customer record is created in your accounting system.
- A new lead requests a meeting with your sales team.

Actions

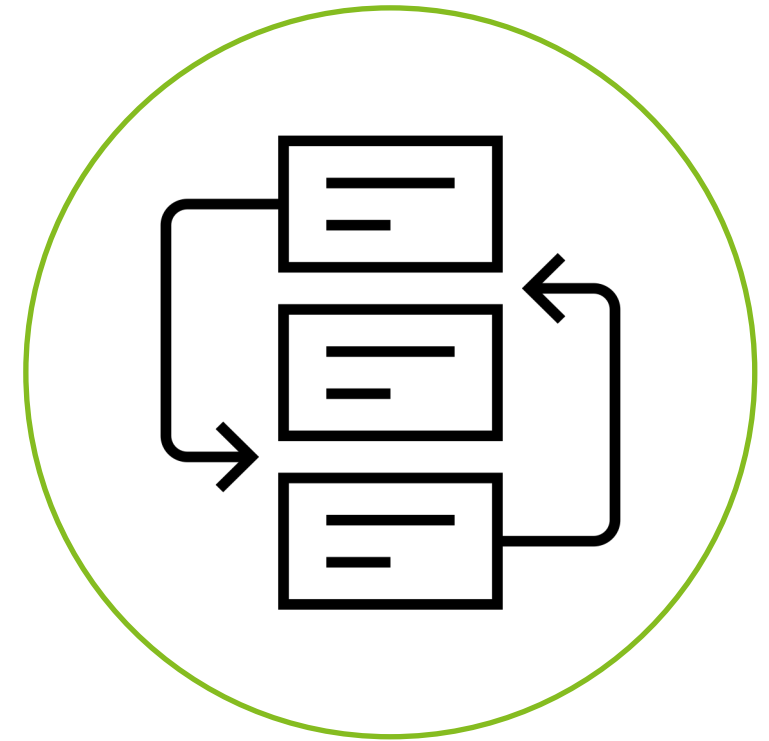
Steps in the automation workflow

- A new invoice is created in the accounting system with the order information.
- A message is sent on Teams or Slack.
- An email attachment is copied to SharePoint or Google Drive.
- A calendar invitation is created and sent to relevant parties.
- A specific spreadsheet is updated with new information

Integration and Data Sharing Tools

Major examples of this category of tool

- **Power Automate.** A powerful tool to connect resources inside and out of the Microsoft ecosystem of products.
- **If This, Then That (IFTTT).** A fantastic option for home, IoT, and personal projects.
- **Zapier.** Great option when many integration touchpoints are required and mostly web-based.
- **n8n (pronounced n-eight-n).** An awesome option that utilizes FREE and open-source technology.
- **Zoho Flow.** A great option for users who are already leveraging the power of Zoho.



Polling Question #2



Which of the following statements is true concerning AI and Automation?

- All AI projects must be automated.
- All automation projects utilize AI
- AI and automation can be used together or independently of each other
- None of the above

Getting started with the virtual office for your organization

Let's define the objective and goals
of working remotely



The Basics Of Working Anywhere

- We live in a global economy. Your company could be located in Los Angeles, your developers in India, and customers spread across the globe
- It is common to do business with clients, customers, and vendors worldwide. It would be best if you thought globally to remain competitive. This is not optional
- The virtual office allows you to remain connected to your organization by giving you the tools to conduct business anywhere in the world



Virtual Office & Work From Anywhere

Definition and importance

- Technical Definition. A virtual workplace is a workplace that is not located in any one physical space. It is usually a network of several workplaces technologically connected (via a private network or the Internet) without regard to geographic boundaries. Employees are thus able to interact in a collaborative working environment regardless of where they are located. A virtual workplace integrates hardware, people, and online processes
- My definition. A virtual office is free from the traditional limitations of working in a single physical office.
- It empowers users to adapt their work lives to meet their personal lives.
- A virtual office is more than just working on a beach. It is the ability to work anywhere, at any time, and on your terms.



Benefits of the Virtual Office

- Cost savings. On average, remote workers can lower operating and real estate costs by \$11k per employee. Additionally, they will personally save \$4k by avoiding the costs of having to work in an office.
- Increased employee retention, satisfaction, and work-life balance.
- Decrease in employee absenteeism and attrition.
- Possible increased flexibility in hour hours and workspace.
- Decrease energy and fuel requirements for commuting.
- Expanded Candidate Pool. You can significantly diversify your candidate pool by including stay-at-home parents, millennials, military spouses, people with disabilities, and other candidates with excellent qualifications that meet your needs.



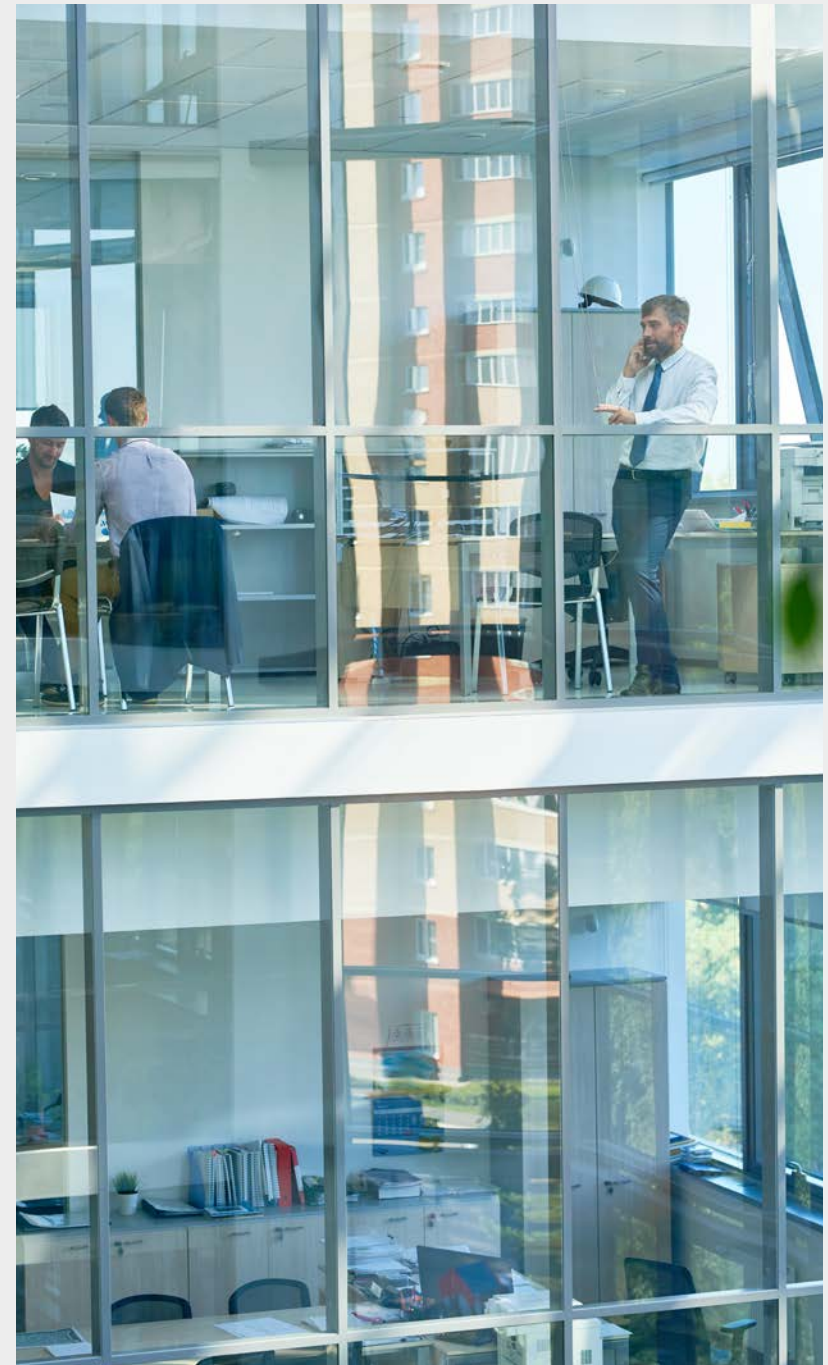
Risks of the Virtual Office

- Less opportunity for collaboration. It's hard to replicate the entrepreneurial efforts of face-to-face collaboration.
- Security concerns for staff working with sensitive information.
- Possible increased cost to the employee for working from home.
- Difficult to understand the organization's direction. It can be hard to get everybody on the same page when scattered. Technology will only get you so far.
- Losing company culture. It's hard to build an esprit de corps when nobody is around. Connecting is what drives innovation and drives innovation.
- Low producers can fly under the radar. Low-producing employees will be able to get by without much scrutiny.
- There might be increased technology costs to the business, but many of these increased expenses would be incurred anyway.



The Hybrid Office

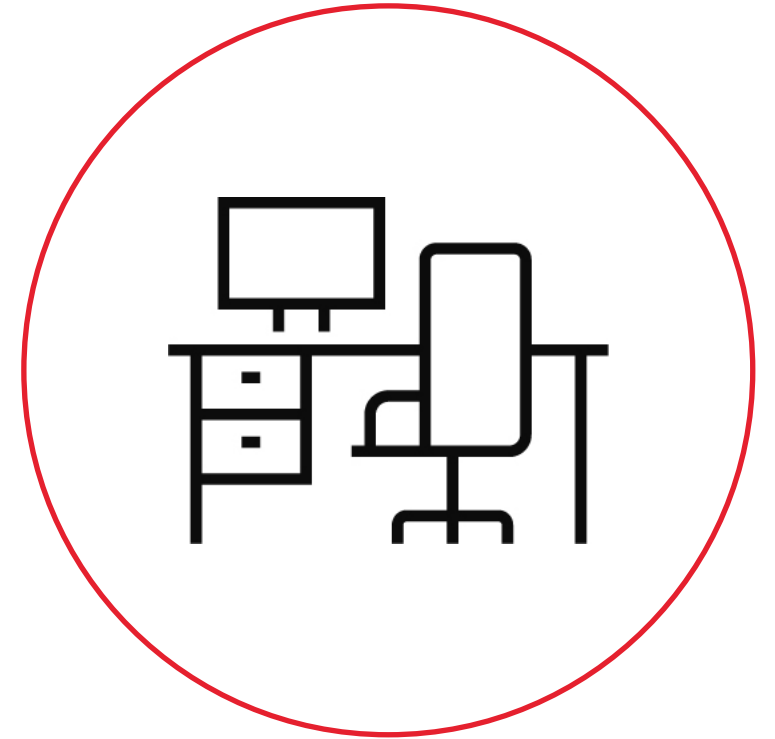
- A hybrid office consists of remote staff and staff who work from a centralized office.
- Only 8% of remote employees are willing to return full-time to work after the pandemic, according to the Remote Work & Compensation Pulse Survey. While 48% of workers want to work from home permanently, the remaining 44% want to work from home part of the week.
- Staff members can choose where they are the most productive and work from there. Sometimes that might be in the office, and other times it might be from home or elsewhere.
- Some workers might choose to always work in the office, but others might choose to work from home a couple of days per week.
- Read more at <https://bit.ly/3KFM1cT>



The Essentials of the Virtual Office

What You Need in Your Virtual Back Office

- Communications to stay in contact.
- Remote access to your files and documents across all your devices.
- Security to keep your information private.
- Applications or Cloud services to support remote work.
- Collaboration tools to work with your colleagues.



The Essentials of the Virtual Office *(cont'd)*

The stuff you need to be effective from anywhere

- Dedicated, private workspace with comfortable seating.
- Lightweight but powerful laptop.
- Fast, consistent, high-quality Internet access.
- Smartphone, which can be used as a hotspot.
- Good office chair, keyboard, and mouse.
- Minimum of two monitors
- Headset and webcam for video conferencing.



Tips For Working Remote

- Have a plan. Write down your goals and objectives. Attempt to identify and resolve your biggest hurdles and roadblocks to be effective.
- Set work hours and daily limits. Generally, you will find yourself working more than 40 hours a week. Don't forget to take a lunch break!
- Communicate regularly with your colleagues and clients on the status of projects and deliverables. Communication is key.
- Be available for social interaction with your colleagues.
- When meeting with staff or clients, have your camera on. Avoid multitasking and be engaged with the conversation.
- Track your time on projects, set milestones, and identify success metrics.



Polling Question #3



What is the expected cost savings per staff member that works remote?

- \$2k per year
- \$4k per year
- \$11k per year
- \$20k per year

Virtual Office Hardware

Recommendations for your computer,
monitors and more



What Kind of Computer Do I Need?

Thin Clients and Mobile Devices

- As transaction processing is typically done either on a centralized server or a cloud provider, a powerful desktop computer might not be required for every user.
- You might want to utilize either a thin client desktop terminal or a notebook computer for your users. Thin clients are generally less expensive than traditional computers. Notebooks give your staff the freedom to work anywhere.
- It is recommended that your devices run the latest version of Windows 10 (or later) or macOS.



2022 Recommended Hardware Specs

Windows 11

- Latest version with all security updates.
- **Processor.** Intel or AMD, but series 5, 7, or 9 (preferred)
- **RAM.** 16GB – 32+ GB preferred.
- **Hard Disk.** 512GB - 1TB+ SSD
- **GPU.** Separate from the CPU, Nvidia, or AMD.
- **Extras.** HDMI, USB-C, Wi-Fi 6e, etc.

macOS

- Latest version with all security updates.
- **Processor.** M1, M1 Max, M1 Ultra
- **RAM.** 16GB – 32+ GB preferred.
- **Hard Disk.** 512GB - 1TB SSD
- **GPU.** Separate from the CPU, NVidia or AMD
- **Extras.** HDMI, USB-C, Wi-Fi 6e, etc.

2022 Top Portable Computers



Generally, laptops are preferred to desktops

- Dell XPS 13 Plus
- HP Elite Dragonfly Chromebook
- Lenovo ThinkBook Plus Gen 3
- Lenovo ThinkPad Z Series
- MSI GS77 Stealth
- Acer Predator Triton 500 SE
- Asus ROG Z13 Flow
- Asus ROG Zephyrus G14
- Asus ZenBook 17 Fold OLED
- Alienware x14

Office 365 & Google Workspace

Business productivity software
powered by the Cloud



What are these tools?

- These services provide a set of Cloud-based business productivity and communication apps.
- They are provided in a Software-as-a-Service (SaaS) environment where the provider is responsible for all technical operations.
- Unlike the other Google, Microsoft 365 is provided as both a cloud-based and desktop-based productivity suite.
- They include traditional office tools such as word processing, spreadsheet, and presentation.
- They include hosted communication services such as email, instant messaging, shared calendars, and storage.
- They are all high configurable and scalable. They can grow with your business from the start-up to Fortune 500.



Workspace vs. Microsoft 365



	Workspace	MS 365
Entry Price	From \$6 user/month (monthly commitment)	From \$5 user/month (full-year commitment)
Storage Options	30 GB per user, or unlimited for enterprise accounts	1TB per user for hosted plans. No storage for one-time purchase plans
Plan Choices	\$6 to \$18+ per user per month	\$5 per user per month to \$35+ per user per month
Commitments	Flexible month-to-month or annual commitment	All plans require an annual commitment

Spotlight on Google Workspace

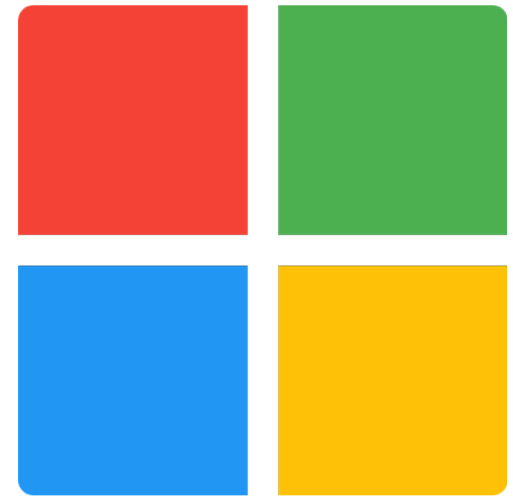
Everything you need to get anything done

- Fantastic set of tools for communication, storage, and collaboration.
- Does not include any financial tools, but there are many integrations to other products and services.
- Great migration and support tools to get you going and keep you going. Natively built for the Cloud and mobile devices.
- Excellent option for all business sizes, but particularly good for small businesses that don't want the headache of configuration or the need for additional enterprise applications (e.g., CRM, ERP, etc.).
- From \$6/user/month \$18/user/month. The only major difference between plans is the amount of storage. The functionality and apps are the same.
- Learn more at <https://workspace.google.com/>



Let's Focus on Microsoft 365

- The largest, most powerful, and most configurable selection of tools and services.
- Contains the same great applications (e.g., Word, Excel, Exchange, etc.) that your organization has been using for years. No need to learn something new.
- Select Microsoft 365 Business Plans to allow for the installation of Office on 5 PCs or Macs, five tablets & 5 mobile devices
- Continuous update of the Microsoft Office applications and exclusive online capabilities of the Microsoft 365 platform. Get all the latest updates as soon as they become available.
- Mixture of both Cloud-based, desktop applications, and mobile applications. You get the best of all worlds.
- An excellent option for personal use or any size business, but particularly good for organizations already utilizing other Microsoft products.



What is Microsoft Teams?

- Microsoft Teams is a centralized communication tool for your organization. It incorporates chat, audio, video, file, and document collaboration.
- It is the lynchpin application in the 365 ecosystems of products. It brings together functionality from almost all applications.
- It is included with Microsoft 365 and has replaced Skype for Business in July 2021.
- In January 2022, it reached 270 million monthly active users!



Why Teams is Better Than All Other Tools On the Market Today

- **Office/Microsoft 365 Platform.** It is deeply integrated into the 365 ecosystems and draws functionality from virtually all platform aspects.
- **Zero infrastructure to build or maintain.** Microsoft centrally manages all aspects of the Teams experience.
- **Work from anywhere.** Teams works on all central computers and smartphones. If you can access the Internet, you can use Teams.
- **All major communications points are supported.** You can video conference, chat, real-time collaborate on a file, host a webinar, etc.
- **Price effective.** It's already part of your 365 plan, or you can use it for free (up to 100 users).



Power Query in Power BI & Excel

Extract and load data from anywhere!

- Power Query is a data transformation and data preparation engine.
- Using Power Query, you can perform the extract, transform, and load (ETL) processing of data.
- Probably the best feature added to Excel in the last 10+ years.
- This feature will revolutionize how you use Excel. It can easily save you hours and days.
- Learn more at <https://bit.ly/3uH14gB>



Latest and
greatest apps
& services



Rambox

- Ram box is a workspace organizer that allows you to unify as many applications as you want, all in one place.
- It is perfect for those who care about productivity while working with many business and personal apps.
- It supports over 700 apps, tools, and platforms, all from a single application. Using Rambox, you do not have to install every communications tool.
- Rambox is very useful if you need to run multiple versions of Teams, Slack, Discord, etc. However, it often runs the web version of those tools, and there can sometimes be functionality limitations.
- They offer a free version and paid versions.
- Learn more at <https://rambox.app/>



Clockify

The Best and Truly Free Time Tracker For Teams

- Clockify is a simple time tracker and timesheet app that lets you and your team track work hours across projects.
- Track time you've spent working on activities, clients and projects. Get an accurate measure of your time for reporting, productivity, billing and more.
- Simple and intuitive interface. You can easily integrate the tool into your organization's workflow with minimal effort.
- You can run the entire service in your browser, but they also offer both desktop and mobile apps.
- Unlimited users, free forever. However, they do have some additional upgrades you might want to consider.
- Start tracking your company's time for free using Clockify! Learn more at <https://clockify.me/>



Calendly

Schedule Meetings Without the Back-and-Forth Emails

- How it works is simple. First, create some simple rules to let it know your availability preferences. Second, share your link with staff, clients, etc. Third, they schedule meeting with you based on your availability.
- Calendar integrations. Works with your Google, Outlook, Office 365 or iCloud calendar so you're never double booked.
- Control. Set buffer times between meetings, prevent last minute meetings, create secret event types, and more.
- Learn more at <https://calendly.com/>



Stream Deck

Hands down the best tool to automate your day.

- A Stream Deck is an external programmable “hot key” USB keyboard.
- The Stream Deck allows you to easily program your most frequently used shortcuts to keys on the device.
- The screen and keys can be completely customized to any user, any use case and any application.
- For example, you could use keys to trigger actions in Excel or to launch commonly use files. You can even program more complicated actions would be automating time entries. The possibilities are endless!
- Price varies from \$79 to \$250 USD depending on size.



Grammarly

Your Writing, at Its Best

- Grammarly is a plugin for your favorite Internet browser. It corrects writing mistakes and helps you become a better writer.
- Grammarly corrects over 250 types of grammatical mistakes while also catching contextual spelling errors and poor vocabulary usage.
- Grammarly helps you write mistake-free on Gmail, Facebook, Twitter, Tumblr, LinkedIn, and nearly anywhere else you write on the web.
- They have a plugin for Microsoft Word and Outlook.
- They offer free and paid versions of their platform.



Ninite

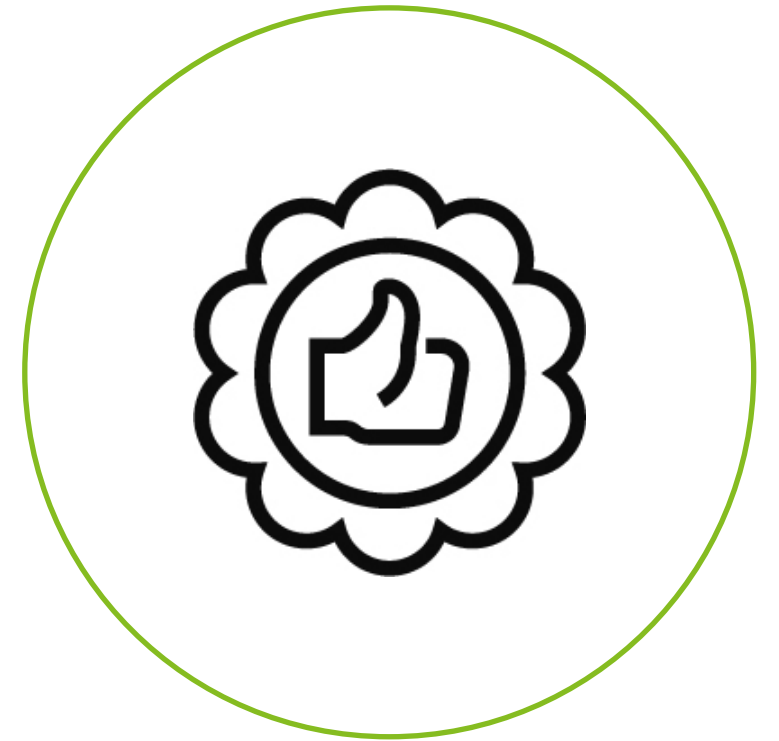
Install and Update All Your Programs at Once

- Ninite can install and update dozens of applications all at once on your computer.
- Fantastic tool for workgroups or new computers. Easily manage applications from a central management tool.
- Great applications, including utilities, messaging, desktop publishing, security, and media.
- No sign-up is required and completely free.
- Download some fantastic apps for your Windows PC.
<https://ninite.com/>

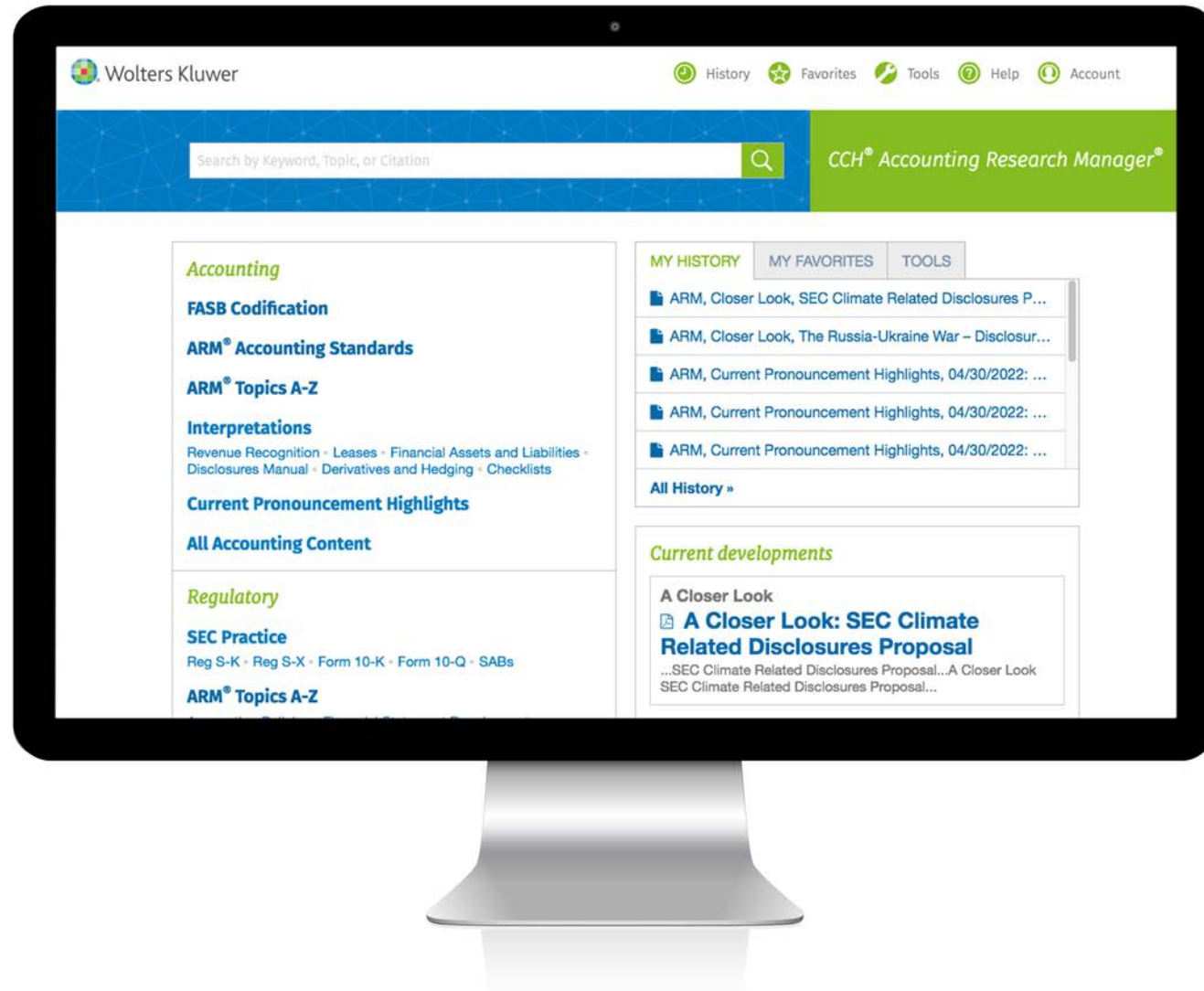


Summary & What We Learned

- Determine what technology should be implemented into your organization to build your own virtual office and collaboration suite.
- Identify major opportunities and business cases where data sharing and integration would be efficient, effective, and useful for an organization.
- Identify and utilize new apps, websites, and services to gain efficiency in your personal life and better meet organizational needs;
- Define integration and discuss how it can be used inside an organization to improve data sharing and automation.
- Identify the cost and benefits of the various data sharing techniques and approaches to an organization.



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Additional information in CCH[®] Accounting Research Manager[®]



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Matt Seegmiller is a Lead Product Manager for CCH Accounting Research Manager at Wolters Kluwer. He works with both CPA firms and Corporations sharing best practices to ensure they are utilizing CCH Accounting Research Manager to its fullest.

Polling Question #4



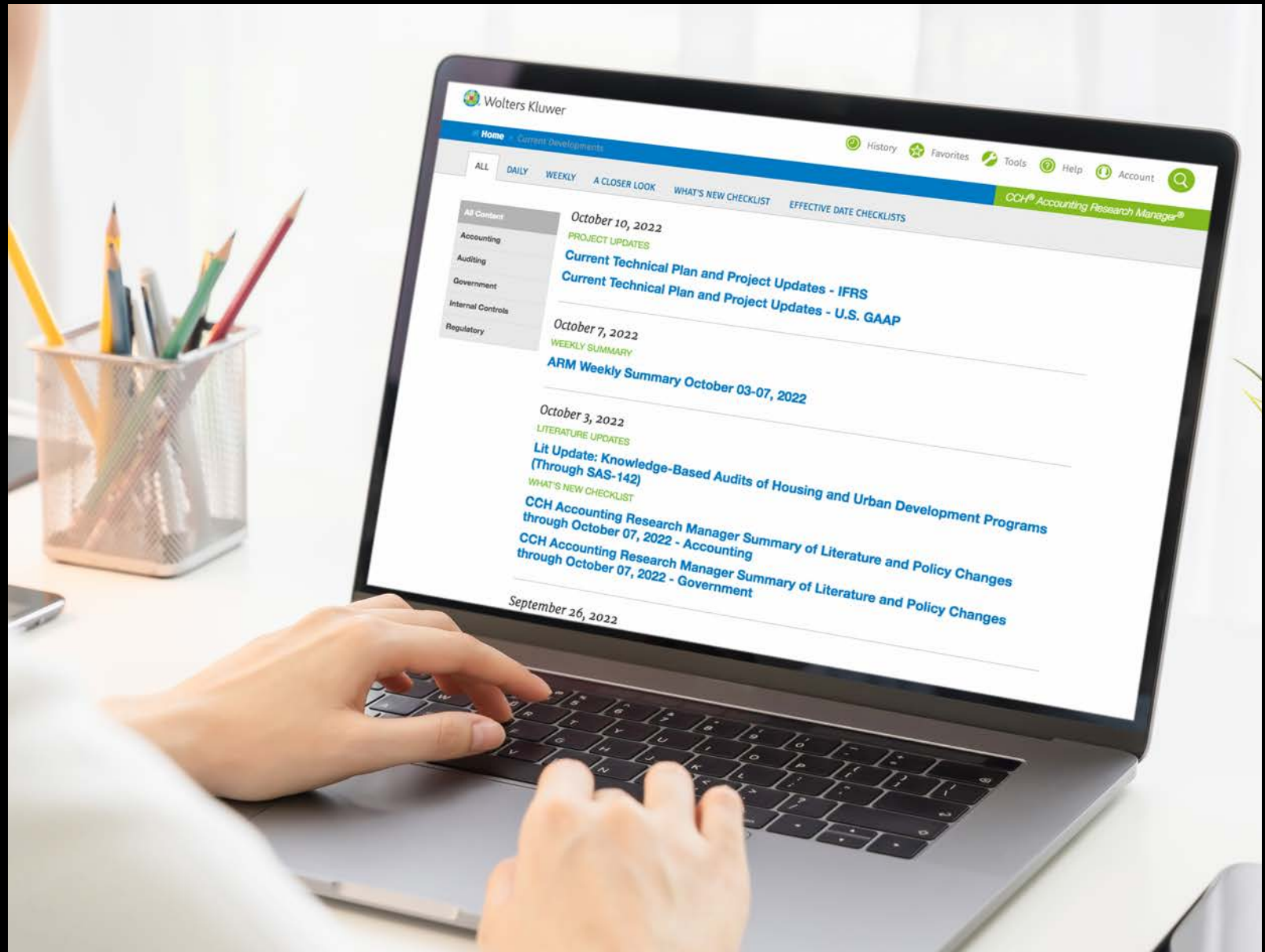
Would you like a more in-depth demo or further details on the resources and tools available in CCH Accounting Research Manager?

- Yes, I would like an in-depth demo
- No, I already use CCH Accounting Research Manager
- No, I don't want to learn more at this time

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→ [Register to try it for free](#)

→ [Learn more about CCH Accounting Research Manager](#)



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Bridging the
Talent Gap

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setting if window does not appear)



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- Founder and Partner of Devmatics, LLC.
- Primarily focused on enterprise, mobile app, and e-commerce software development. Focusing on developing custom enterprise systems, mobile apps, and custom integration solutions.
- Author 50+ continuing education courses and invited speaker to over 75+ events per year for CPAs and financial professionals. I love helping people! 😊
- Certified Public Accountant with 15+ years of experience working in both public and private accounting.
- Licensed pyrotechnician and fireworks expert. Regularly designs and shoots shows all over the USA.



Thank you for joining us today!

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