



Connected Accountancy

The key to new levels of client service

Accountants who use BlackBerry® smartphones to stay connected can be more responsive to opportunities, more accessible to clients and more effective in growing their practices.

Accountants have always relied on face-time with clients, but in today's increasingly competitive market, time spent with clients is essential. BlackBerry smartphones allow accountants to confidently take their business out of the office and to their clients, while ensuring they remain productive, accessible and responsive.

As well as managing their inboxes, contacts and schedules, connected accountants using BlackBerry smartphones can securely access practice management systems to record billable time, manage documents, capture and access client data, improve practice workflow and manage finances whilst on the move.

Virtually any process or software can be mobilised securely on the BlackBerry platform, which integrates seamlessly with existing IT systems. This can provide compelling benefits.

For example, accountants who use mobile dictation solutions have cut their document turnaround times from days to hours, saving time, improving client service and boosting profitability. Accountants using mobile CRM to manage client data have saved an average of an hour a day per user, equating to £1000 a week.

There is a BlackBerry solution suitable for all sizes of firm, with comprehensive yet simple-to-manage controls that ensure all information is secure and protected and gives complete, auditable control over devices, applications and data.

Benefits

- Improve client satisfaction and retention
- Access real time practice information for improved quality of service and operational efficiency
- Secure and easy-to-use
- Rapid ROI



Boost profitability

with mobile time and expense capture

Challenge

For outbound accountants who spend time working away from the office, accurate and timely recording of chargeable time and associated expenses can be a challenge.

Many accountants combine traditional client tasks with advisory and consulting services, often on either a fixed-fee or ad-hoc basis. To help ensure profitability, especially on fixed-fee tasks, accountants need a secure and reliable way to record accurate and detailed time and cost data at the point of service delivery.



BlackBerry® Torch™ 9800 smartphone with a screenshot of the Rekoop application for BlackBerry®.

Solution

Time and expense capture apps for BlackBerry® smartphones prompt accountants on the move to quickly and easily capture billable time and expenses against a particular client and project as it happens. This could be a phone call, a meeting, a taxi fare or an email response – these solutions enable accountants to capture it accurately to ensure it gets charged.

These apps work either by extending existing office-based time-capture systems to accountants' BlackBerry smartphones, where time captured is automatically sent to the practice management or timesheet system and allocated to the relevant project; or as standalone solutions which collect data that can then be entered into office systems.

Both of these approaches ensure that the billing process becomes part of the mobile accountant's natural workflow, without creating an additional time burden. This increases the efficiency of data capture, and reduces time leakage and 'lost' costs. For accountancy practices looking for ways to optimise revenues, control expenditure and improve overall project profitability, these solutions offer a way to effectively achieve these goals.

By improving the quality and accuracy of recorded billing data, practices can recognise their most profitable projects, identify sources of cost leakage and analyse the real cost of internal and non-billable projects. From the client's perspective, more accurate and timely project expense and billing data from their accountant means more transparency, encouraging trust and fostering partnership within the client/accountant relationship.

Time and expense capture solutions for BlackBerry smartphones include:

- A4P from AIRTIME-Manager®
- Rekoop™ from Greystone Managed Services

These solutions enable mobile accountants to capture chargeable time as it happens, and record costs as they are incurred. Because of the potential for increased billings, improved cost management and practice profitability, these solutions can quickly deliver a return on investment, and justify the provision of BlackBerry smartphones to all fee earners within the practice.

Benefits

- Instantly record chargeable time and expenses
- Reduce revenue leakage
- Maximise profitability and accountability
- Faster billing and improved cashflow

Find out more

Discover more about time and expense solutions for BlackBerry smartphones:
professionalindustry-uk@rim.com
www.blackberry.com/uk/accounting





Keep work moving

with digital dictation

Challenge

Modern accountants increasingly spend more time with clients, and this can have a significant knock-on effect on practice workflow. Accountants on the move are forced to wait until they can get back to the office to keep client requests and business processes moving forward.

Mobile accountants need convenient tools that help them quickly pass instructions, meeting notes and documentation requirements on to support staff. This would enable them to improve client service and value delivery, while optimising their practice's efficiency and profitability.



BlackBerry® Bold™ 9780 smartphone with a screenshot of the BigHand application for BlackBerry®.

Solution

Using a BlackBerry® smartphone as a digital recording device, accountants on the move can take dictation and record instructions to staff as they go. These instructions can be transmitted back to support staff or transcription teams as soon as they are finished, or when the accountant chooses.

This connection to support staff enables accountants to spend more time out with clients - with no need to return to the office to deliver tapes or dock a digital portable device they can make more productive use of their time and capitalise chargeable opportunities.

Dictation solutions for BlackBerry smartphones include:

- BigHand
- WinScribe

Using digital dictation on the BlackBerry platform can also improve the personal productivity of individual fee earners. The use of recorded voice notes is a much faster, more convenient and productive way to feed tasks and workflow back to the office than typing out emails or documents. It also provides a full audit trail of instructions given and enables accountants to receive documentation such as meeting notes or figures they have asked for much faster.

Using voice recognition technology in these apps, accountants can also turn dictations into documents automatically. These can then be edited, emailed or filed, all from the BlackBerry smartphone. The data security inherent to the BlackBerry platform ensures that voice files and all other data remain protected at all times.

These solutions are easily accessible to accountancy practices of any size - as well as the traditional licensing model, they are also available on a per-user/per-month basis. A web-based back-end reduces implementation time and cost for firms not requiring more complex workflows enabled by server-based systems.

The net result is improved workflow, more time to spend with clients, increased chargeable time for the practice and more responsive and valuable client service, all of which can add up to significant competitive advantage.

Benefits

- Improve workflow and efficiency
- Share opportunities faster
- Secure and convenient
- Audit trail of requests and actions
- Fully utilise office-based staff

Find out more

Discover more about voice productivity and digital dictation on BlackBerry smartphones:
professionalindustry-uk@rim.com
www.blackberry.com/uk/accounting





Mobile document management

Challenge

An effective accountant/client relationship relies on the timely sharing of accurate and up-to-date information. Delays and untimely data can diminish the value of the services being provided.

This presents accountancy practitioners with a challenge – how can they provide face-to-face client service, while also being able to rapidly access up-to-date information from within the practice's systems?

To meet this challenge, progressive accountancy practices must find a way to empower their increasingly mobile professionals to access and manage documents and information – and comply with appropriate regulation – when they are away from the office.



BlackBerry® Bold™ 9780 smartphone with a screenshot of the Autonomy iManage application for BlackBerry®.

Solution

A BlackBerry® smartphone running iManage WorkSite Mobility enables accountants to overcome the challenge of document access when they are out of the office. This app is the mobile version of the iManage WorkSite document management system – it enables accountants on the move to access, capture and centrally store vital information in the same way that office-based colleagues do.

Using WorkSite Mobility on a BlackBerry smartphone, accountants can:

- View, reply to, and forward emails and attachments from WorkSite
- Store, send and attach files to emails while collaborating with colleagues or communicating with clients
- Do full metadata searches, and leverage the same automatic profiling as in the office
- View active engagements, most recent documents, missed calls and the day's schedule, all on one screen

- File email correspondence to the relevant client folder in the WorkSite system as well as easily search for and view information
- Create rules to automatically profile and file emails to specific engagements.

Uniquely with a BlackBerry solution, users can continue to perform WorkSite functions even if there is no network signal, including assigning and filing emails to client files, creating new emails and attaching documents.

This app enables mobile accountants to continue working efficiently wherever they are, boosting both individual and practice productivity and helping them make better, faster decisions. The BlackBerry smartphone becomes an extension of the office document management system, allowing practices to ensure business continuity, empower better teamwork and manage regulatory compliance.

Benefits

- Improve productivity and responsiveness
- Manage email data effectively
- Boost collaboration and information sharing
- Achieve regulatory requirements

Find out more

Discover more about iManage WorkSite Mobility for BlackBerry smartphones:
professionalindustry-uk@rim.com
www.blackberry.com/uk/accounting





Training and communications

at a time and pace that suits

Challenge

Accountants who already face increasing client, competitive and economic pressures, can find it difficult to make the time to complete mandatory and other training requirements or consume practice communications.

Accountancy practices need a flexible, convenient and cost effective way to allow fee earners and other mobile staff to receive, undertake and log their training in a way that impacts as little as possible on their billable time, and enables them to continue delivering exceptional client service.



BlackBerry® Torch™ 9800 smartphone with a screenshot of the Chalk application for BlackBerry®.

Solution

Mobile e-learning solutions for the BlackBerry platform such as Chalk™ and Intuition enable accountancy firms to extend their learning, development and compliance programmes beyond the desktop, delivering more cost effective training, increased return on investment in BlackBerry® smartphones, and improved learner performance.

These smart apps allow accountancy practices to send easy-to-use training modules and other communications like video, audio or multimedia updates and briefings out to fee earners' BlackBerry smartphones. Practice managers can then track and report in real-time on delivery, opening, test scores and completion rates, ensuring improved compliance management and auditable training records.

All content can be delivered over-the-air to accountants' smartphones – the device will alert the accountant when new content has arrived. Content is stored on the BlackBerry smartphone for viewing even when network coverage is unavailable, enabling fee earners to put any potentially 'dead' time (such as 'in transit' time) to productive use.

Using this approach, fee earners can complete 'just in time' training and consume communications at a time and pace that suits them, and so improve their completion and compliance rates while optimising their billable time.

By leveraging the security measures inherent in the BlackBerry platform, practices can share confidential and sensitive information, confident that the data will remain safe at all times.


Benefits

- More flexible and convenient learning
- 'Just in time' approach
- Faster and earlier completion rates
- Reduced training costs and increased ROI

Find out more

Discover more about mobile e-learning solutions for BlackBerry smartphones:
professionalindustry-uk@rim.com
www.blackberry.com/uk/accounting





Secure mobile document access and management

Challenge

Juggling the needs of several clients simultaneously, accountants face significant diary pressure and demands on their time. This can inevitably lead to workflow hold-ups if the accountant is unable to return to the office to file and retrieve documents on the corporate network, share documents with colleagues or clients, and generally move workflow forward.

Mobile accountants need convenient ways in which they can interact with documents and information as though they were in the office.



BlackBerry® Bold™ 9780 smartphone with a screenshot of the Cortado application for BlackBerry®.

Solution

Cortado Corporate Server is an app that turns a BlackBerry® smartphone into a complete workstation, enabling users to access, edit and organise files on the corporate network.

This approach eliminates the need for accountants to take a laptop with them everywhere they go, and dispenses of the need to complete extensive log-in authentication or find network coverage in order to connect with the practice network.

Users of Cortado Corporate Server on a BlackBerry smartphone can:

- Simply and securely access files on the corporate network using the BlackBerry smartphone
- Print, fax or even present documents from the network while at a client's office
- Save email attachments to network drives, encouraging improved information retention and team collaboration
- Email documents on the network to clients or colleagues, boosting efficiency and productivity of individuals and teams and keeping work moving faster.

This solution allows mobile accountants to respond more rapidly to client demands, ensuring that the information they share with clients is always the most up-to-date. It strengthens the relationship between practice and client by enabling accountants to be increasingly responsive and well informed. It can also significantly reduce the amount of time accountants spend travelling, by enabling them to access the files they need when they need them, regardless of location.

Benefits

- Improve client response times
- Access and print corporate documents from anywhere
- Capture more chargeable time
- Travel without a laptop

Find out more

Discover more about Cortado Corporate server for BlackBerry smartphones:
professionalindustry-uk@rim.com
www.blackberry.com/uk/accounting





Capture written data easily

with a digital pen

Challenge

Accountants often need to capture information that can only be written, such as client meeting notes, declarations, form completions, financial data and signatures. If this is done using paper and pen, a natural delay in workflow will arise as accountants have to pass documents back to support staff in the office for processing.

A simple and reliable method of capturing handwritten content digitally would allow mobile accountants to capture more information more quickly, and make it instantly available in back-office systems or to support staff.



BlackBerry® Bold™ 9780 smartphone and Digital Pen from PaperIQ with a screenshot of the PaperIQ application for BlackBerry.

Solution

PaperIQ is a simple and intuitive app which allows mobile accountants to easily capture digital hand-written content in the field. It combines a digital pen and a BlackBerry® smartphone, enabling the user to write out notes, enter form data or complete assessments as normal.

Every pen stroke is digitally captured as the user writes, and can be transmitted automatically back to support staff at the practice, or stored for later transmittal. As the app simply captures handwritten content there is no training requirement for the end user – it provides an intuitive way of collecting written information in the field.

Using this app, mobile accountants can capture more data at the right moments. Information like form completions, client approvals and required signatures can all be captured using the digital pen, with the information entered into the practice's systems in real time. The app can recognise and convert handwriting into useable data for any back office system.

With information transmitted straight away, support staff are able to move client work forward from the moment the digital pen is used. Inevitably the result is that the practice can process profitable business faster and provide greatly improved speed and quality of client response.

The PaperIQ digital pen also automatically captures the date and time that any form fields or other data is completed. This provides a complete audit trail of paperwork, approvals and submissions, and removes the possibility of handwritten notes and documents being lost or misfiled. Because it is completely auditable, it can also provide clients with immediacy and visibility into activity on their account.

Benefits

- Rapid data capture and no lost paperwork
- Faster and better client responses
- Improved audit trail of paper-based processes
- Intuitive to use

Find out more

Discover more about PaperIQ Digital Pen for BlackBerry smartphones:

professionalindustry-uk@rim.com

www.blackberry.com/uk/accounting

Discover more about BlackBerry® solutions for Accountants:

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