

TAX TALKS

Australia's Tax News Podcast - The Podcast for Australian Tax Professionals

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158 | Process Automation

Process automation sounds great. It promises happiness ever after. But it is not that easy to get there.

Process Automation

To better understand what process automation can do for us, we reached out to Tim Hoopmann of Spinn Business Solutions in Sydney, who is very active in the app and technology space to give you a first insight.

Here is what we learned from talking to Tim, but please listen to the interview itself since Tim explains this much better than we ever could.

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How It Was

When Tim Hoopmann started his bookkeeping practice Cornerstone at the start of this century, it was a different world. There was paper everywhere. It was desktop software. It was manual. And it was sending paperwork to clients and subsequently chasing them for it.

Why It Changed

Three things triggered the desire to move away from a paper-based practice.

One was, the practice wanted to have better control. Running around chasing paper didn't feel like having control.

The second reason was that they saw an opportunity to be different. Back then most people had never heard of Xero or even cloud accounting software.

And the third thing was that driving around all day, picking up paper wasn't fun. It wasn't a good lifestyle.

How It Changed

The journey from paper into the cloud took some time. People didn't know about Xero. There weren't many connected apps. But over time persistence paid off.

The first step was changing the practice itself over to the cloud. It started with Xero and slowly transgressed to connected apps came. The practice tried each app, before it was recommended to a client.

This seems to be a common approach. Streamline and automate your practice. And the knowledge and experience you gain from that, you can then share with your clients. Use your practice as the flagship model.

The Mother Ship

Use one platform as the mother ship. As the single source of truth. For accountants and tax agents this is often the cloud accounting software. But it might also be a different software or app. It depends on the focus point of your practice. And then connect the apps to this mother ship.

How To Choose an App

Before you choose an app, look at your internal processes. Map out what you are doing now. Then work out the app or the technology you need to automate these processes.

Summary

Apps are powerful tools to enhance your business. And you choose them based on what enhancement you want to make.

“Technology is an enabler. The power of automation gives you the tools to make your business more productive and streamlined. And turn it into a business where you are happy to go to everyday.”

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