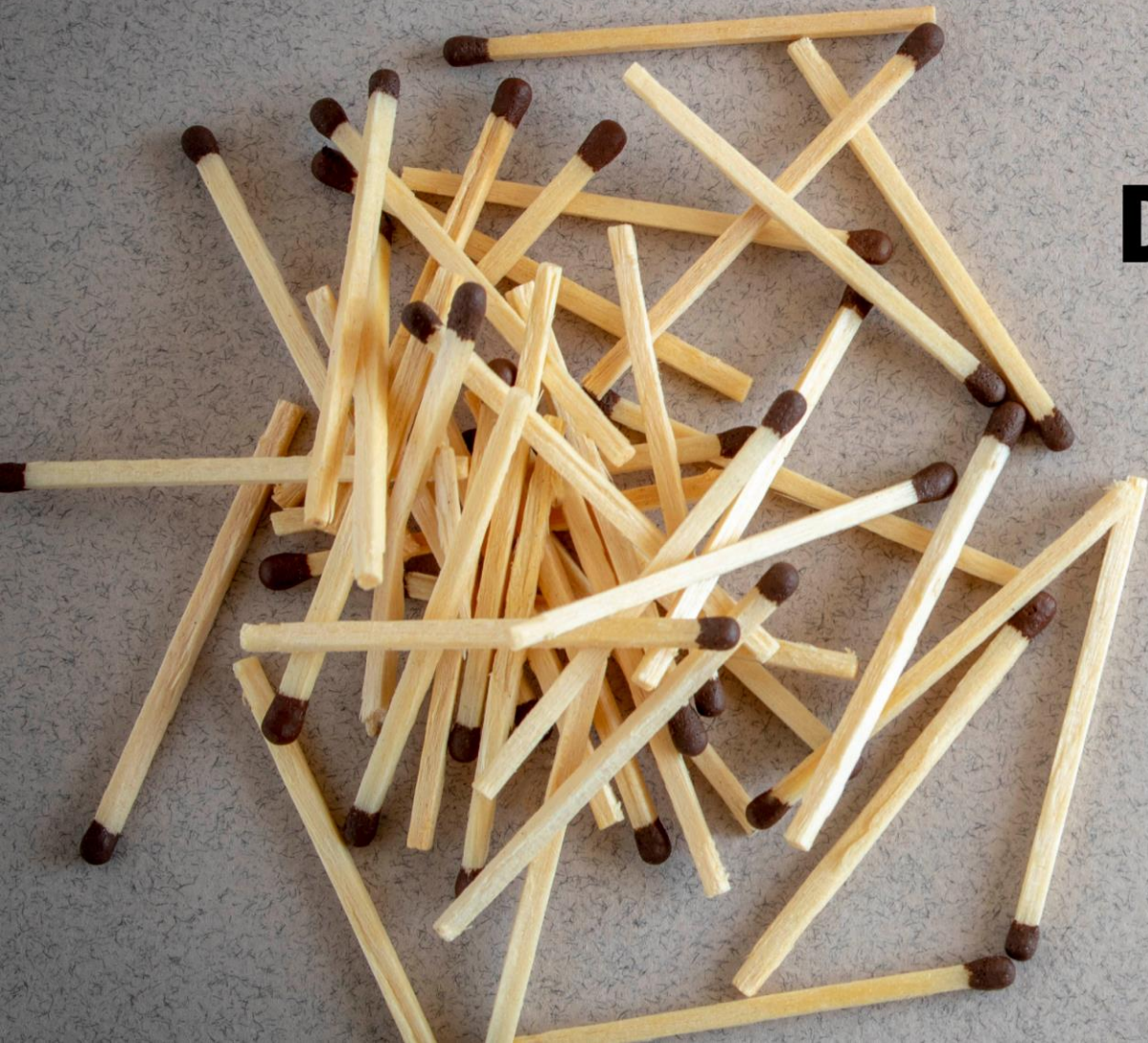


# Streamline Your Workflow

**Using Technology to  
Document your Processes**



**WOODARD™**



# Learning Objectives

- Understand the importance of process documentation in accounting and finance.
- Identify key processes that should be documented to ensure compliance and accuracy.
- Learn how to create a process documentation framework that fits your business needs.
- Discover technology tools that can simplify the process of documenting processes.
- Gain practical tips and strategies for effectively using technology to streamline your process documentation efforts.



# The Recipe for Success



Oatmeal Cake

For cake, pour boiling water over oatmeal, cover and let stand for 20 minutes. Beat butter until creamy; gradually add sugars and beat until fluffy. Blend in vanilla and eggs. Add oats mixture; mix well. Sift together flour, soda, salt, cinnamon and nutmeg. Add to creamed mixture. Mix well. Pour batter into well-greased and floured 9 inch square pan. Bake in pre-heated oven (350) for 50 to 55 minutes. Do not remove cake from pan.

For frosting, combine all ingredients. Spread evenly over cake. Broil until frosting becomes bubbly. Cake may be served warm or cold.

chocolate  
over top

THE *NEW YORK TIMES* BESTSELLER

# THE **CHECKLIST** MANIFESTO

HOW TO GET THINGS RIGHT



PICADOR

## ATUL GAWANDE

BESTSELLING AUTHOR OF *BETTER* AND *COMPLICATIONS*



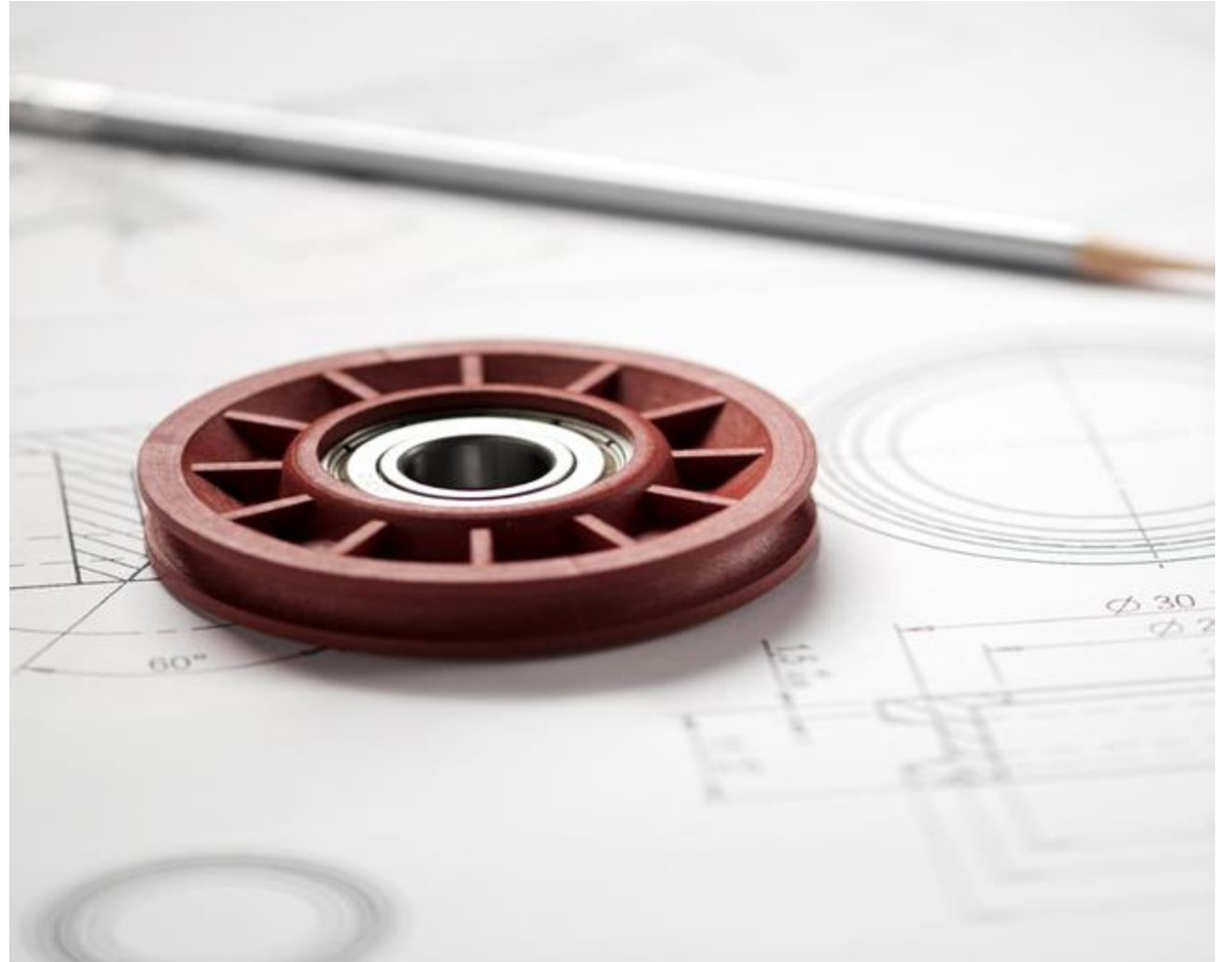
You can't make a recipe for something as complicated as surgery. Instead, you can make a recipe for how to have a team that's prepared for the unexpected.

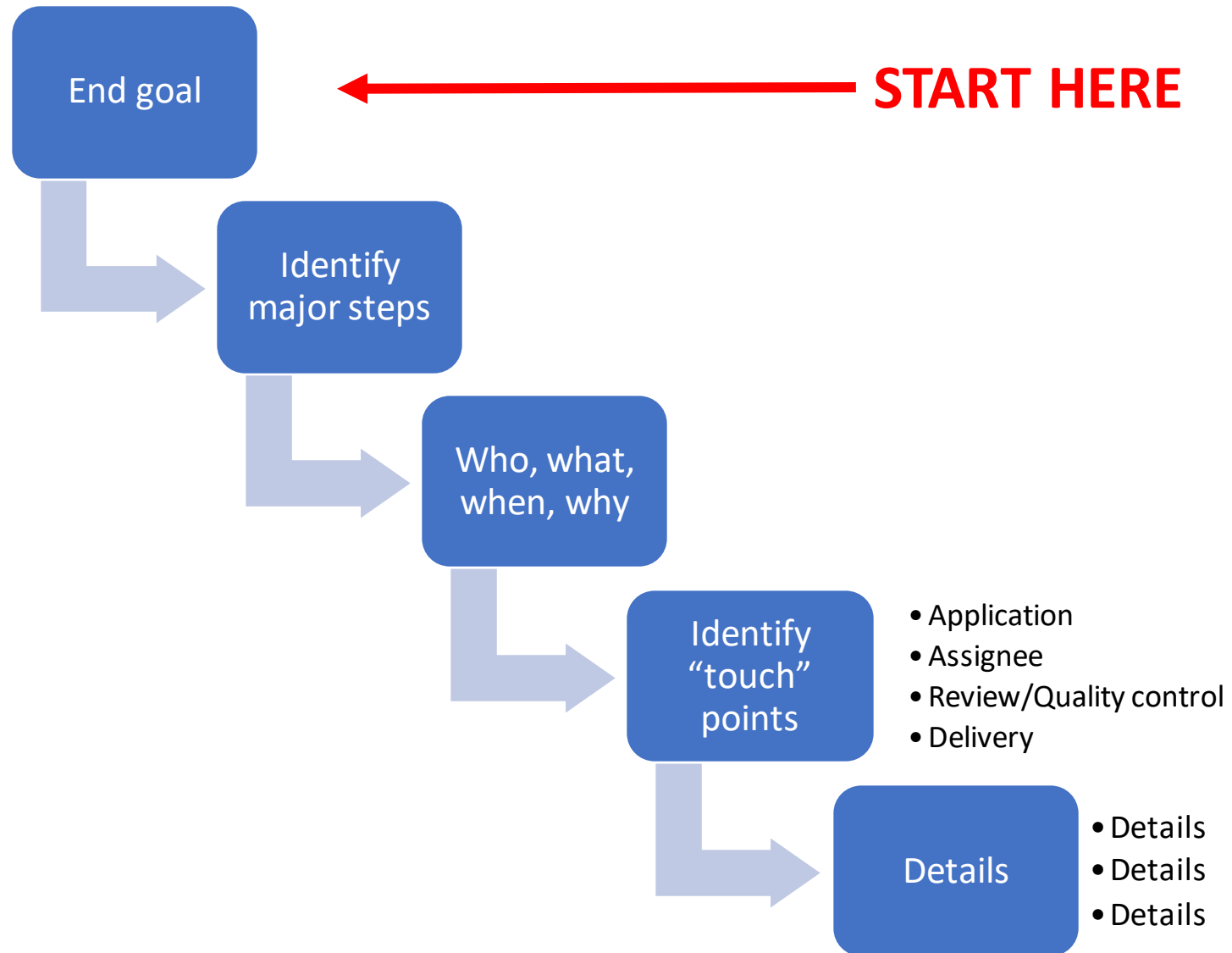
**ATUL GAWANDE**



## Why document your processes?

- Provides guidance and clarity to your team and clients
- Maximizes efficiency and consistency
- Bolsters quality control
- Is the path to effective automation





# Capturing the Workflow

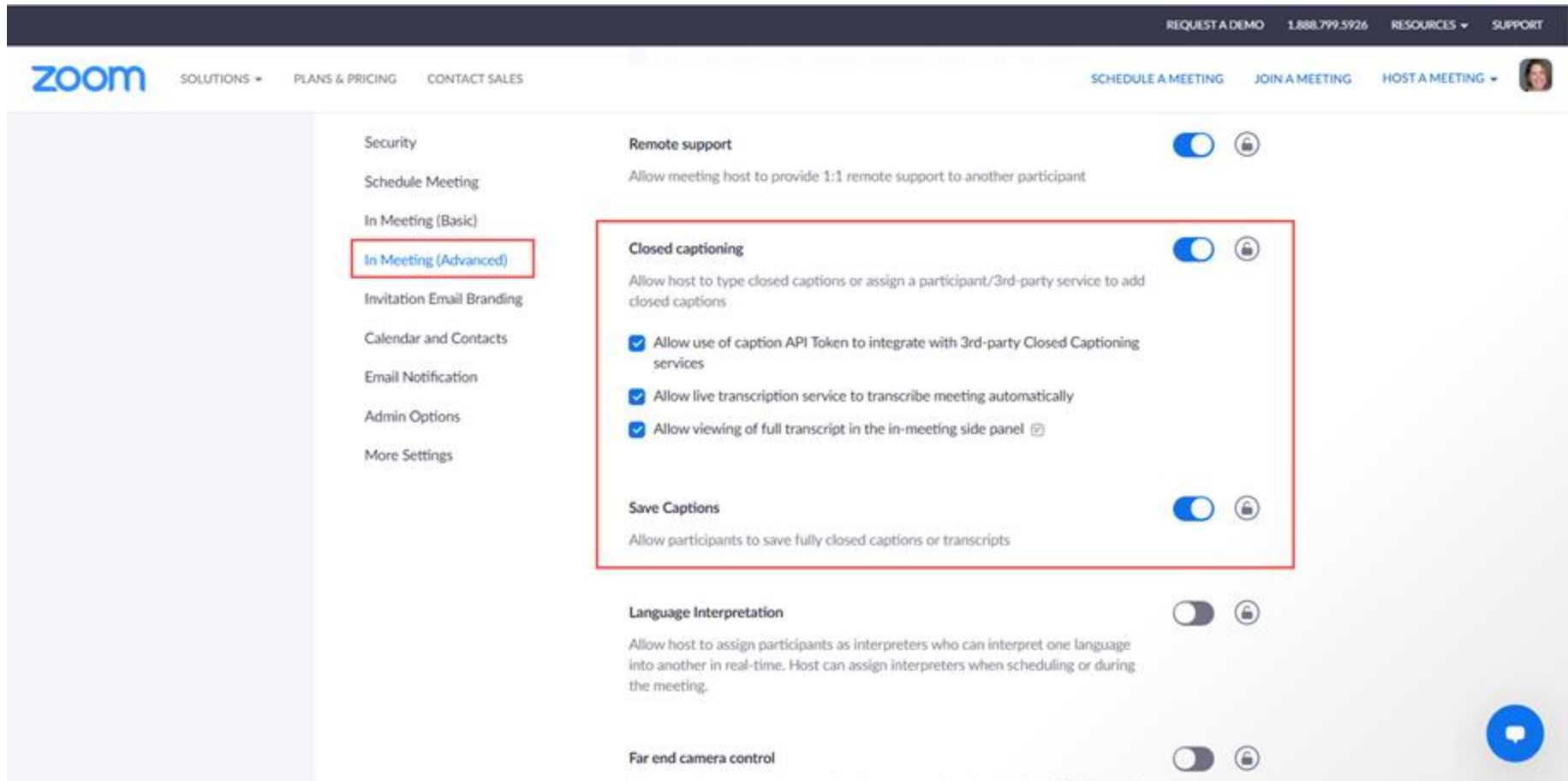











# Using video to document workflow

- Record a session with Zoom, Loom (or another app)
- A video is worth a thousand words
- A commentary is worth two thousand words
- Consider using the transcription feature (or use an app)
- Embed or provide a link to the video in a workflow app

# How to enable transcription in Zoom

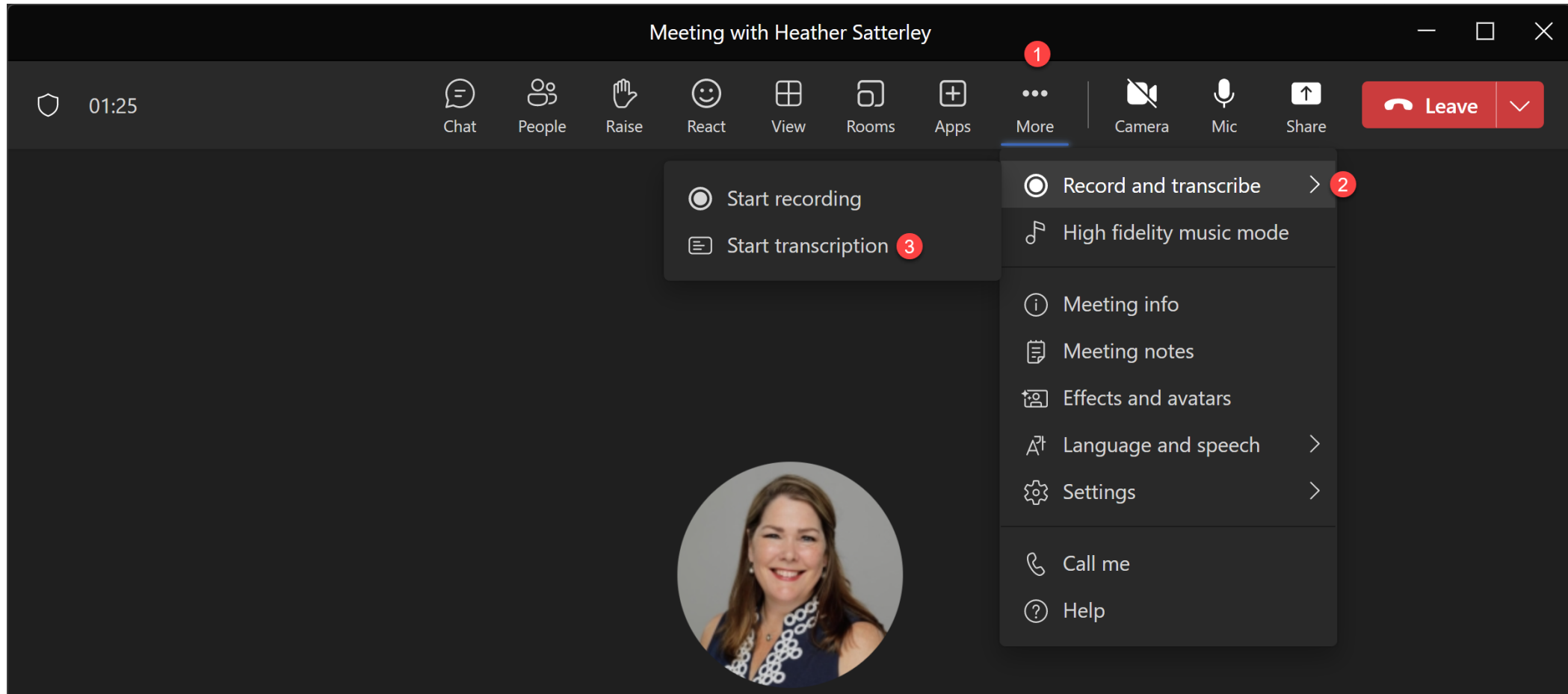


# Where to find the Zoom transcription

Name	Date modified	Type	Size
 audio_only	9/14/2021 5:12 PM	M4A File	39,009 KB
 audio_only_1	9/14/2021 5:12 PM	M4A File	19 KB
 chat	9/14/2021 5:02 PM	Text Document	3 KB
 closed_caption	9/14/2021 5:02 PM	Text Document	41 KB
 playback	9/14/2021 5:12 PM	M3U File	1 KB
 zoom_0	9/14/2021 5:12 PM	MP4 File	488,294 KB
 zoom_1	9/14/2021 5:12 PM	MP4 File	33 KB



# How to enable transcription in Teams



## Other transcription apps

Rev.ai

Otter.ai

Fireflies.ai

Avoma

## Apps that capture workflow

Scribeshow.com

Confluence

FlowShare

Tango



# Scribehow

← Using Bank Feeds

Section

Instruction

Tip

Heads Up!

Record More Steps

Select Multiple

Combine Steps

Combine Similar

Support

1 Navigate to <https://app.qbo.intuit.com/app/homepage>

2 Click "Banking"

3 Click this text field.

Shareable with Link

Share

Copy Link

Engagement

Notify? ✓ X

1 View

0 Claps

Options

☐ Team Comments

☐ Public Comments

# Scribeshow features

- Captures each step as you complete your work, **automatically**
- Can edit steps and include instruction, tips, and placeholders
- Can add, edit, delete, and combine steps
- Can provide a link, or download in multiple formats

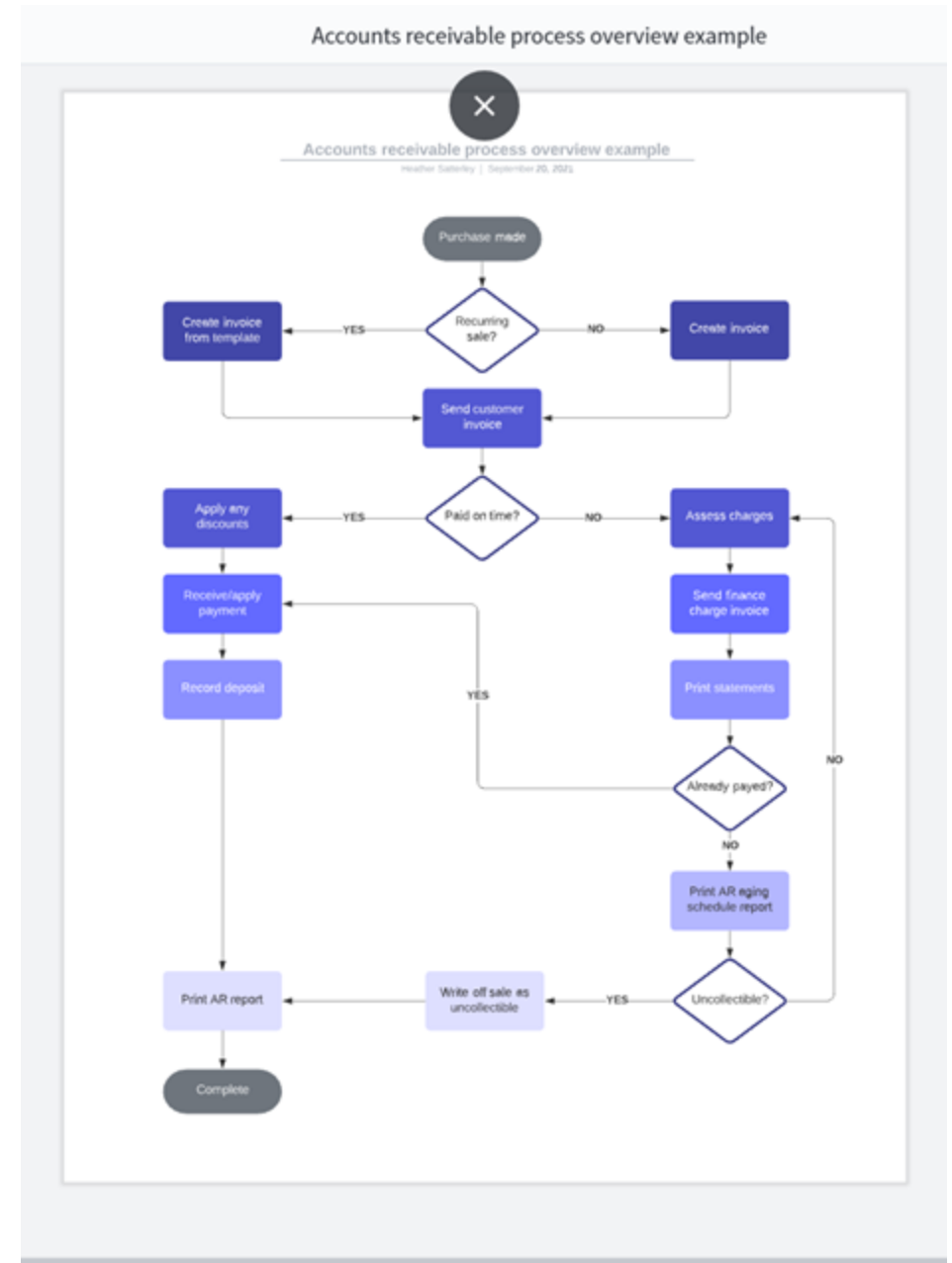
# Mapping the workflow

LucidChart

SmartDraw

Miro

Visio

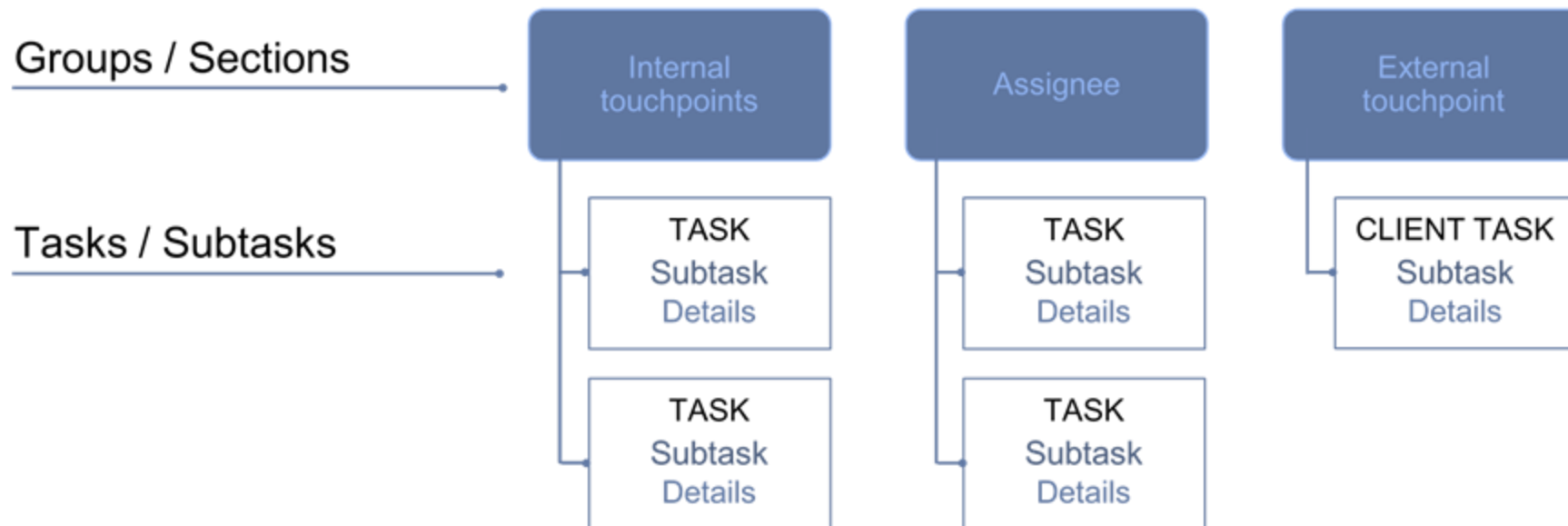




# Putting it all Together



# Things to consider: Structuring your work



## Selecting a Workflow Solution – Accountant-Specific

Karbon

Intuit Practice  
Management

JetPack  
Workflow

Canopy

Aero  
Workflow

Mango  
Practice  
Management

## Selecting a Workflow Solution – Non-Accountant-Specific

Asana

Monday.com

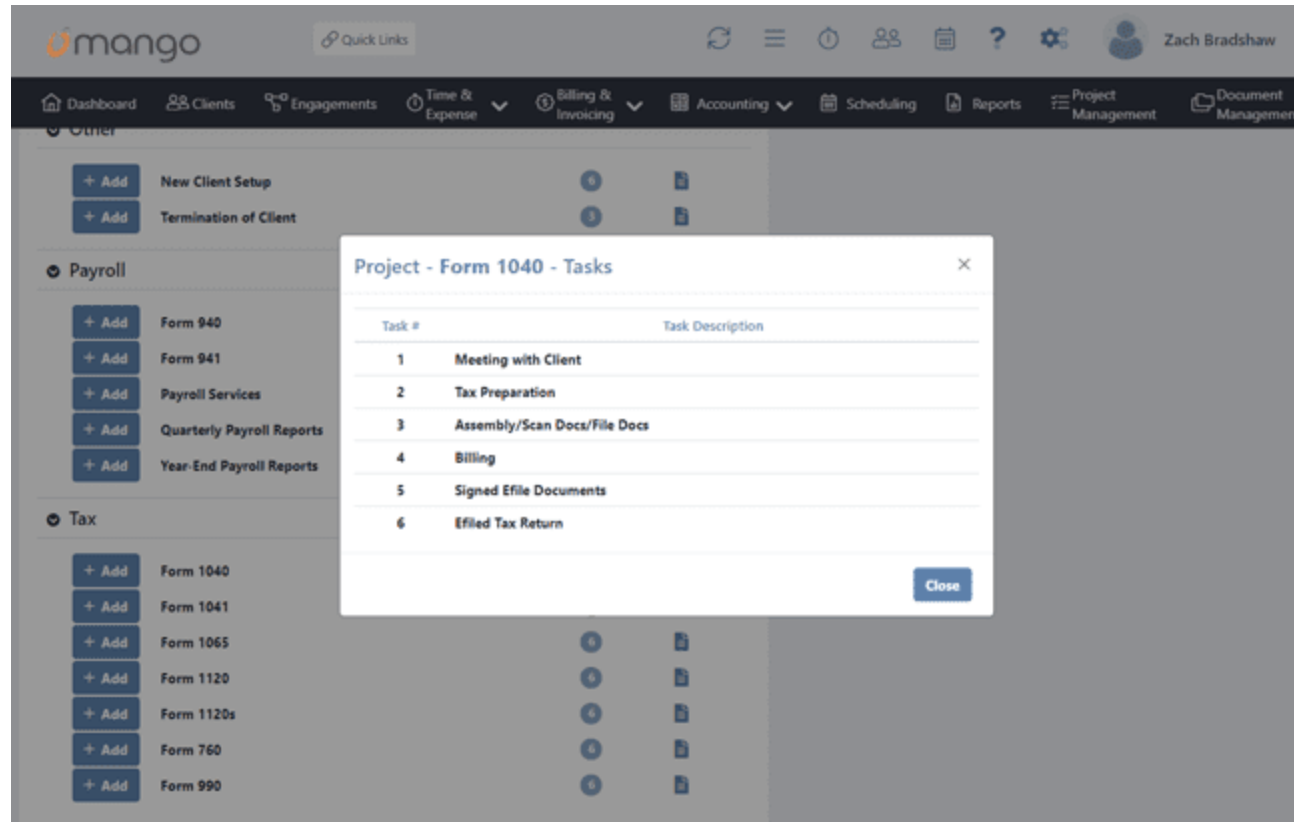
Process St

ClickUp

Trello

TeamWork

# Structuring your Work



Add descriptions and links/attachments to your projects:

- ☐ Videos
- ☐ Scribes
- ☐ Quality control checklists



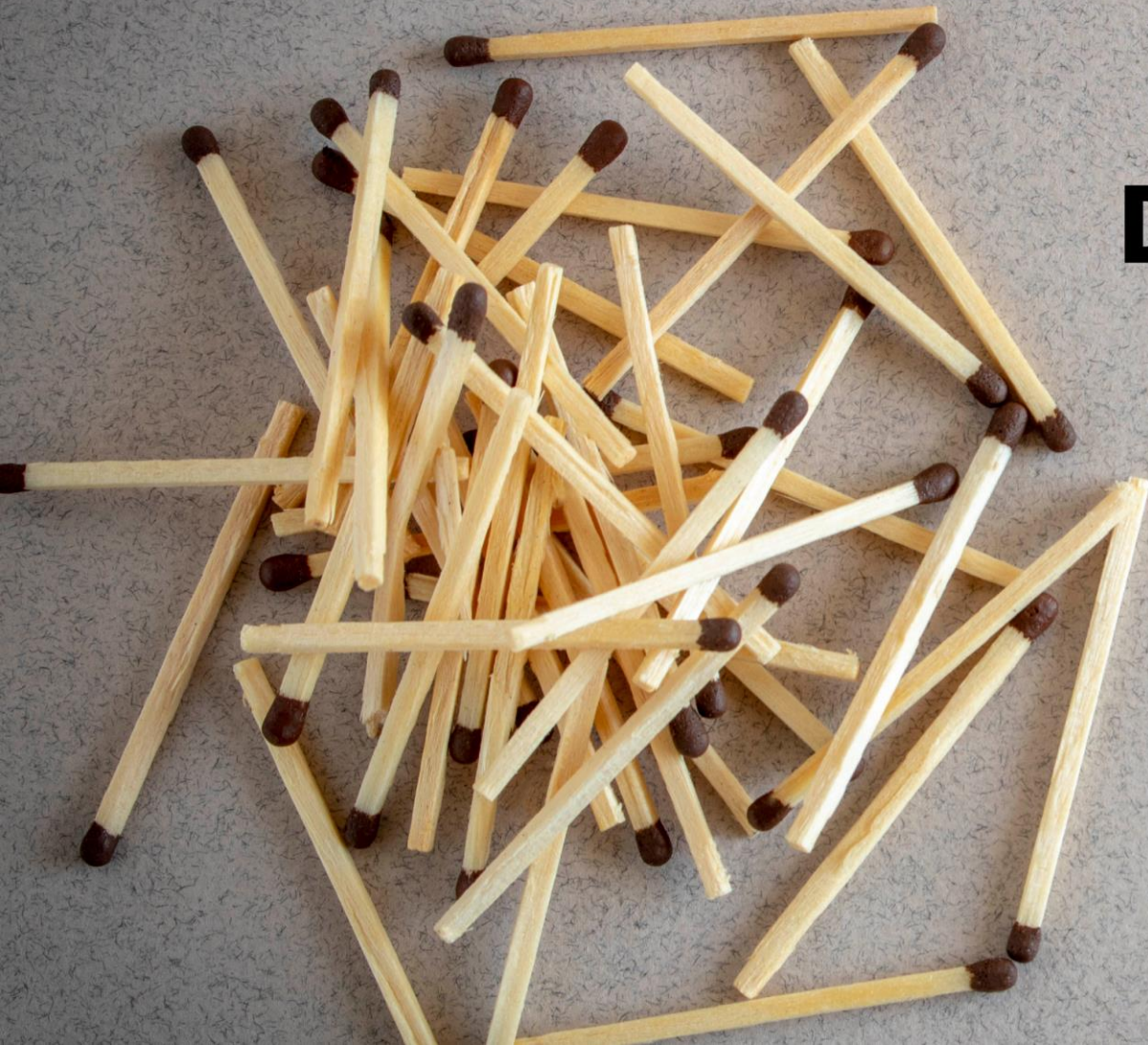
# Key Takeaways

- Documenting processes takes time upfront, but the investment is priceless
- Start with the end goal in mind
- Use technology to record steps in the process
  - Video
  - Transcription
  - Screenshot capture
- Analyze processes to find inefficiencies and optimize workflows
- Use project/practice management apps to house your processes



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