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Begin Your Modern Journey

Several years ago I started writing about a concept I called the Next Generation Accounting Firm®, which today has evolved into what I term The Modern Firm. The original idea centered on a choice: Do you want a business that supports the life you want to live, or a business that consumes your life? The answer seems obvious when put in these terms. Yet, considering the number of accounting firm owners who feel completely devoured by their businesses, it’s clearly not an easy choice to make. The majority of firm owners I talk with are still overwhelmed by the firm they’ve created—one that consumes their life. Of course, whether you choose to be a Modern Firm or not, chances are you will still survive in the tax and accounting profession, at least in the near term, because you are willing to struggle through. In other words, you can continue to operate a business that consumes your life and it will still probably pay you well. But why sacrifice so much when there’s an easier way?

Anyone that knows me knows that I admire the genius that was Steve Jobs. One of his most inspiring speeches was to the graduating class at Stanford University in 2005, where he said:

“Your time is limited, so don’t waste it living someone else’s life. Don’t be trapped by dogma, which is living with the results of other people’s thinking. Don’t let the noise of other’s opinions drown out your own inner voice. And most important, have the courage to follow your heart and intuition. They somehow already know what you truly want to become. Everything else is secondary.”

I still feel today that his quote speaks directly to me. There is a dogma that is the accounting profession—and you know it and feel it with every deadline that passes and ill-fitting client you try to serve. My goal with this guide is for you to see that there is a better way and you don’t have to be trapped by outdated conventions. The world and the accounting profession are evolving at a dizzying pace, and at some point you will have to engage in this evolution. The time is now.

Deeper Insights into The Modern Firm

Have you ever experienced a point in your life where you felt stuck? By stuck, I mean behind the times. I can remember two such significant times in my life. The first was when I was in my mid-30s. I was in the Levi’s store on Michigan Avenue in Chicago with my two oldest kids who were at or near middle school age. I was looking for a pair of the typical high-waisted jeans when my kids both said, “Dad, you’re dressing like an old man.” I had worked in a high-end men’s clothing store all the way through college; fashion was my thing. I realized in that moment that I had gotten stuck...not just in fashion, but in life.

The Modern Firm

To make this monumental shift in thinking, it’s important for you to understand what’s at stake. Consider each major element of your life below:

- **Freedom**—Do you have the freedom to work and enjoy life the way you desire?
- **Relationships**—Are you able to embrace and enhance relationships the way you want to?
- **Creativity**—Do you have the time and energy to be creative in designing your business?

If you feel consistently limited in any or all of these areas, then you understand what’s at stake—and it’s important to understand that you do have an achievable option. You can choose to build your business as a Modern Firm. If you don’t have a plan for the technological shifts coming your way, the challenges you currently feel with freedom, relationships and creativity could get progressively worse.

*A Modern Firm is...*

A business built on focused intention and unmitigated entrepreneurial spirit that enables you to have the life you want.

It’s a business model that supports an environment where you can be present in all aspects of your personal and professional lives to have the greatest impact on family, staff, clients and community.

It’s a business that operates independent of you—creating a better working culture for your practice; offering security through recurring revenue; fostering creative thinking; evoking excitement with each new stage of evolution; inspiring the next generation of professionals; and built for transition to support all phases of your life.

This is the firm you can have. That’s the choice you get to make today!
Fast forward almost 20 years. As I listened to my now grown children talk about wearable technologies, blockchain, cryptocurrencies, and pulling news from sources I’d never heard of, I realized that once again I was behind the times...that I had gotten stuck. I had become too comfortable in a rapidly changing world.

The Modern Firm is about staying relevant...about not getting stuck during times of great change. In my 30+ year career in the tax and accounting profession, I’ve witnessed sweeping technological and cultural changes on an unprecedented scale. We are firmly in an era where these changes will cause more disruption and challenge the relevancy of firms than ever before.

Today, we are witnessing the convergence of three significant changes:

**Vendors**—The technology that firm owners have used to build their practices over the past 20 years will all soon change. Every vendor in the accounting industry has launched or is launching new cloud-based solutions. While firms may be accustomed to cloud innovations, are you ready to shift every solution used inside your firm in a short period of time?

**Staff**—There are more millennials in the workplace today than any other demographic, and they are changing the landscape within firms. Advanced technologies offer a new way to work, where we are connected 24/7 and able to work from remote locations. As such, staff are redefining the concept of work-life balance—seeking performance-based over time-based outcomes.

**Clients**—Clients’ expectations are shifting, demanding less friction in their business transactions. They expect instant access to information from any device, and with real-time precision. And not just any information, but data that adds value to their management and decision-making processes. The same old financial statements and tax returns with little context is no longer acceptable.

These shifts are taking place all around and at breakneck speed. As a result, nearly every facet of life is changing for many. We need to acknowledge these changes and find a way to swiftly adapt.

“We are living in an era of historical upheaval. The pace of change, globally, has never been more rapid. It’s unsettling to some, enticing to others. Either way, it is unavoidable.”

— Robert Safian, Editor and Managing Director, Fast Company

**Examples of Modern Businesses**

The word modern means: “Characteristic of present and recent time; contemporary; not antiquated or obsolete.” Modern is something you just know when you see it. There’s something alluring about modern businesses, pulling you in and motivating you to do business with them.

A few examples include Amazon with its One-Click to purchase, Apple with its superior user experience, and Starbucks with its app that allows customers to quickly place an order from home and pick up their product upon arrival. These businesses are alluring to today’s modern consumers.

Modern Firms are those that leverage technology to not only create a superior end-to-end experience for their clients, but also to create a modern culture within their practices that empowers employees to solve issues and engage and contribute to the greater good of the business.

A recent survey by Gartner Research reported that 89 percent of companies now expect to compete mostly on the basis of client experience—versus 36 percent only four years ago.

Because of the convenience it provides, technology is clearly a key driver in enhancing client experience. In-my-pocket, anytime-anywhere is today’s clients’ expectation—and, yes, the expectation of their accounting professional as well.

**Unavoidable**. Not a choice. As entrepreneurs, we have to accept and manage the changes that are upon us. We must embrace becoming a Modern Firm.
The Modern Firm is about surviving and thriving in the coming era of technological disruption—while at the same time preserving your freedom, relationships and creativity.

Consider also that we’ve entered the age of artificial intelligence. This type of technology, just like our mobile devices, is weaving its way into the mainstream. Just think of Apple’s Siri, Google’s Home device and Amazon’s Alexa. And while these are examples of consumer devices, be aware that companies like IBM and Intuit are implementing this same technology into solutions that will impact our clients (and our firms).

There’s IBM’s Watson: “Hey Watson, what’s the current section 179 deduction?” Or, “Watson, how much can I contribute to my 401(k)?”

QuickBooks (QB): “Hey QB, would you setup ABC Consulting as a new customer?” QB is smart enough to geolocate ABC Consulting and automatically set up all relevant details based on information searchable on Google.

This isn’t some pie-in-the-sky dream; it’s all within reach today. And it’s going to be disruptive.

This level of technology reduces friction for clients (and staff)—making business transactions effortless. Being modern means reducing friction everywhere it’s found inside your business, and that means adopting innovations expected by today’s ideal clients, such as cloud apps and artificial intelligence—offering value beyond basic product delivery and exceeding client expectations.

There was a time when an accountant could be a really good technician, and that was good enough. They didn’t consider other components of their practice like client experience and culture. But those days are gone. Modern firm owners must consider all facets of running their businesses.

Leadership Begins with Purpose

With the multitude of changes we see occurring across the profession, as you move forward on the Modern Firm path, it’s imperative you embrace the idea of simplicity. If your practice is complicated, you must first consider a strategy for simplification—developing a clear broad vision that everyone understands and can follow.

With all the change and complexity affecting firms today, dedicated leadership has never been more important. Surviving and thriving throughout the next wave of vendor, customer and staff shifts will require leaders to be transformational. This means providing their organizations with a clear and inspiring vision—that bigger why they do what they do. If developed with forethought and honesty, that why then flows into the core values that drive the collective direction of the firm.

In this section, you’ll be guided through the end-to-end strategy of my own firm, RootAdvisors.

Start with Why

We begin with our why. Why are we doing what we do? It’s this bigger why that will set the framework for the pieces that follow. RootAdvisors’ why is as follows:

“Inspire and empower entrepreneurs and their teams to improve their businesses with focused intention to enrich their lives and the lives of others.”

It’s this why that helps us identify our ideal clients and why we serve them. It sets the stage for everything we do.

From here, it’s important to define your firm values. Without a set of values in place, how are you going to make the changes necessary to set your firm on the path to Modern Firm status? Our values guide decision making on all aspects of our business—from our staff to our client experience and technologies.
The Modern Firm Framework™

The Modern Firm Framework was developed to provide firms with a structured roadmap—leading them away from outdated concepts to a model that supports prosperity without sacrificing freedom, relationships and creativity. This framework is comprised of three easy-to-understand elements:

Working ON the Firm
Working ON represents the time you spend developing the culture of your organization—the glue that holds everything together. It requires leadership to set a clear direction for the organization, a defined brand, an improvement plan, and to empower and motivate staff to action. Working ON your business is the process of creating a positive, effective work environment.

Working IN the Firm
Working IN represents your business model for client accounting, tax, payroll and any other products offered. It involves defining your ideal client, the client onboarding process, product offerings, technology solutions, and how you manage your practice.

Working WITH the Client
Working WITH includes all the touchpoints with clients and prospects. It is comprised of the digital, mobile and online experience, as well as the feeling people experience when they visit your office. For example, it can include the client onboarding experience, the clarity and functionality of your website and the power of your marketing and social media initiatives.

The Modern Firm Framework helps you to organize your thinking in order to maximize your ability to manage change. Below is a visual representation:

Our Values
- Elegance—Style, design and simplicity in everything we do.
- Relationships—People and relationships matter most to us.
- Inspiration—we encourage others to be the best version of themselves.
- Modern—We anticipate future needs and create smart solutions.
- Freedom—we aspire to be the best version of ourselves.
- Drive—we are dedicated to be world-class in all we do.

Our core values drive our business model—including the solutions we use, how we treat our clients, and our work culture. These values inspire us to consistently improve operations and adopt the most modern solutions—allowing us to work differently than we did in the past and inspiring us to be the best version of ourselves.

Our why and our values set the tone for everything we do in our organization. However, to really move our business forward, we required a framework within which to organize all efforts—what we call our Modern Firm Framework.

Our core values drive our business model— including the solutions we use, how we treat our clients, and our work culture.
The Modern Firm GPA™

Just like in school, the Modern Firm GPA assesses achievement on a 4-point scale (0.0 – 4.0). By honestly evaluating your firm in multiple areas, you can more easily identify needed improvements. The scale approach offers a better mechanism to measure progress on a continual basis—rather than more binary methods, such as yes-or-no answers. This will make more sense as you read on.

The Modern Firm Framework is designed to organize your thinking into three major areas: working ON your firm, IN your firm, and WITH your client. The Modern Firm GPA is designed to measure how well you’re doing in each of these areas. As you will see in the illustration below, working ON focuses on Culture, working IN is about your Business Model, and working WITH encompasses your firm’s Touchpoints.

The Modern Firm is not just about modern technologies. It’s also about how your culture, business model and client touchpoints come together to create an overall modern organization...the type of business that is enticing to today’s clients and staff.

The illustration of the Modern Firm GPA on pages 14-15 offers a detailed look at each category (Culture, Business Model and Touchpoints), breaking each down into measurable subcategories. Firms score the business in each subcategory using the 4-point scale (0.0 - 4.0), which will lead you to an overall GPA. A perfect 4.0 represents the highest score or “world-class,” while 0.0 represents the lowest score.

You can use world-class businesses, such as Amazon or Starbucks as a frame of reference if you choose. Please note that how you define “world-class” is subjective, but don’t get hung up on that. The objective here is to create an initial reference point and track improvement over time.

The real power in the exercise comes when you can look at your business through the eyes of others. With this in mind, firm leaders should always ask staff to complete the GPA exercise as well. Most find this to be very eye-opening.

The Modern Firm is not just about modern technologies. It’s also about how your culture, business model and client touchpoints come together to create an overall modern organization.
# The Modern Firm GPA Exercise

## TOUCHPOINTS (WITH)
Interactions with your clients

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<th>Culture GPA Components</th>
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<td><strong>Website</strong></td>
<td><strong>Clear Direction</strong> How clearly and accurately you've defined and communicated to staff your firm’s mission, vision and value statements.</td>
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<tr>
<td><strong>Marketing Communications</strong> Effectiveness of the firm's communications strategy in terms of consistency of communications to both existing clients and prospects and accurate, brand-effective messaging throughout marketing collateral.</td>
<td><strong>Brand</strong> Strength of your current brand strategy, including the implementation of a clear and accurate brand promise and brand statement, educating staff on each and ensuring staff execute on both at every level of client interaction.</td>
</tr>
<tr>
<td><strong>Social Media</strong> Effectiveness of the firm’s social media strategy in terms of consistency of postings, presence in multiple channels and brand-effective content.</td>
<td><strong>Improvement &amp; Training</strong> Firm’s commitment to offering ongoing education opportunities to staff, and employees’ understanding of their given roles.</td>
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<tr>
<td><strong>Digital Experience</strong> Effectiveness of the firm’s digital experience strategy in terms of client service within all communication channels, ease of use and ease of information delivery within all channels.</td>
<td><strong>Staff Empowerment</strong> Degree of staff engagement in providing feedback for improvement to leadership, as well as level of empowerment among staff in solving issues on their own.</td>
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<td><strong>On-Premise Experience</strong> Effectiveness of the firm’s on-premise experience in relation to offering a clearly-marked office location, office accessibility via parking area and the overall on-premise client experience.</td>
<td><strong>Staff Engagement</strong> Degree of staff engagement in supporting the firm’s vision, mission and value statements to consistently deliver a rich client experience every time.</td>
</tr>
<tr>
<td><strong>Product Offerings</strong> Effectiveness of product offerings in terms of client ease of use, ability for clients to self-select products and consistency in branding.</td>
<td><strong>Rewards</strong> Effectiveness of staff incentive-based programs in meeting firm goals.</td>
</tr>
<tr>
<td><strong>Onboarding</strong> Effectiveness of the firm’s client onboarding process, as well as a method for signing engagement letters and client information delivery.</td>
<td><strong>Office Environment</strong> Firm’s overall environment in relation to comfort, amenities and modern feel, as well as a positive, competitive-free work culture.</td>
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**TOTAL**

Divide total by 7 to get your Culture GPA

## CULTURE (ON)
The collective beliefs & behaviors of your firm

## BUSINESS MODEL (IN)
The design & plan for your firm’s operation

### Business Model GPA Components

| **Ideal Clients** | How clearly you’ve defined your ideal clients and how effectively you’ve communicated this to staff. You will also assess the firm’s process for vetting ideal clients. |
| **Service Offerings** | How clearly you’ve defined your products and educated staff on each. You will also assess your process for moving existing clients into your product set and your pricing model. |
| **Practice Management** | Effectiveness of practice management system staff training, and leadership’s ability to manage firm performance and profitability using practice management solution. |
| **Technology Infrastructure** | Level of IT knowledge on staff, staff access to proper hardware to effectively perform assigned tasks, and effectiveness of firm’s security policy and staff education and enforcement of security policy. |
| **Software Solutions** | Effectiveness of the firm’s internal solutions, firm client solutions and external client solutions in supporting customized workflows and collaboration. You will also assess the firm’s solution vetting process. |
| **Onboarding** | Effectiveness of the firm’s client onboarding process in relation to standardization across clients, visibility across internal departments and roles, and assignment of a dedicated onboarding team in place. |
| **Client Accounting Model** | How clearly you’ve defined your firm’s client accounting strategy, level of digital environment to support strategy, and how well you’ve defined client and staff roles. |
| **Tax Model** | How clearly you’ve defined your firm’s tax strategy, level of digital environment to support strategy, and how well you’ve defined client and staff roles. |
| **Payroll Model** | How clearly you’ve defined your firm’s payroll strategy, level of digital environment to support strategy, and how well you’ve defined client and staff roles. |
| **Other Models** | How clearly you’ve defined your firm’s other strategies, level of digital environment to support other strategies, and how well you’ve defined client and staff roles. |

| **Your Overall Firm GPA** | Bring the **TOTAL** number from each column (not the average) into the boxes below |

\[
\text{Your Business Model GPA} = \frac{\text{Your Overall Firm GPA}}{24} = \frac{\text{Overall Firm GPA}}{24}
\]
The Modern Firm GPA Tool: Rootworks Grow™ Platform

At Rootworks, we built a Modern Firm GPA Tool as a part of our online member platform—Grow™. Grow allows users to conveniently complete the GPA as often as needed. Data is saved and displayed individually and collectively so you can get a snapshot of your firm’s GPA at any time. Remember, the GPA serves as “a balance sheet” or a snapshot of your firm’s Culture, Business Model and Touchpoints. It’s this snapshot that will serve as a roadmap to improvement for you and your staff.

The Modern Firm GPA exercise in this guide is the base-level version. Inside our online member platform, we have an expanded version that allows you and your team to measure the various components at a more granular level. In addition, we’ve created learning materials designed to help you improve each of the components of the GPA.

Executing on The Modern Firm

Entrepreneurial spirit is a must-have today if you want to build a Modern Firm. There was a time when the most important component of running a firm was making sure the work was done. That’s still important, but equally so are the aspects of Culture, Business Model and Touchpoints, including the technologies that power your firm.

As entrepreneurs, we can no longer just be technicians with a single focus and expect to remain relevant. The world is moving too quickly. Running a modern organization is a full-time pursuit.

Start to execute your Modern Firm by:

1. Articulating your vision—Take a day and figure out why you are doing what you are doing. Create the why that will inspire you and your team to do great work together.

2. Defining your core values—Dig deep into your thoughts and then work with your team to define keywords or phrases that drive your organization and can serve as the pillars that support your decision making.

3. Completing the Modern Firm GPA exercise—The 24 components of the GPA offer a good starting point to assess where you stand today. Be sure to get your team’s input. Their participation will inspire them to be part of the solution.

4. Create your project list—Based on the GPA exercise, build your project list. This is all about working ON your business. What are the components you want to improve in order to modernize your business today?

5. Assign a project champion and execute—This means just what it says. Follow-up and hold your team accountable for progress. The goal is not perfection; the goal is continuous improvement.

6. Wash, rinse, repeat—Every three to six months, repeat steps 3 through 5.

Technologies That Power The Modern Firm

Technology solutions play a central role in powering the Modern Firm. Many of the needed improvements that will come out of your Modern Firm GPA assessment will rely on vetting and implementing modern solutions. The following chart captures key trends that will affect your approach to technology:

- **Data security**—This has become the hottest issue affecting small tax and accounting firms. Organized criminals have figured out that firms have a treasure trove of information within less-than-secure walls. Firms must change the way they work with clients; communications have to become more secure. And this means a move toward applications with superior security standards.

- **Staffing**—This has long been considered one of the top issues in the profession. Professionals must modernize their firms to operate at peak efficiency, or run the risk of losing qualified staff. The technologies that power our business model will be a key driver in creating a modern culture that attracts and retains qualified professionals.

- **Communication**—Clients expect information at their fingertips. Airline, hotel and bank information and documents are now “in our pockets” via smart devices and cloud apps. Driving across town for a meeting when video conferencing is an option is no longer acceptable. Clients want the personal experience of connecting without the inconvenience of traveling.

- **Information sharing**—People no longer want to log in to various websites to access needed documents. The consumer products have won: Box, Dropbox, Google Drive, iCloud and OneDrive. This is where people want their documents stored. A firm’s information sharing strategy must include these consumer solutions.

- **Integration**—Connected solutions are the future. You should not consider any solution that does not allow you to connect to other mainstream solutions. The first question to ask of any solution vendor is: “What is the stance on connecting to other platforms?” If the vendor does not indicate a pro-connectivity stance, then continue your search elsewhere.

- **Educator at heart**—The best way to sell is to focus on helping and educating. In addition to your traditional marketing efforts, also create an education plan for clients and prospects that help them run a more effective organization using modern technologies. Teach them to organize digital documents, use video conferencing and implement cloud solutions.

Now that you understand the trends, the following sections guide you on the technologies that support each component of the Modern Firm Framework: ON (Culture), IN (Business Model) and WITH (Touchpoints).
Working ON the Firm (Culture)

There are not many solutions in the marketplace designed to help you work ON your firm. At Rootworks, we’ve developed a solution for just this purpose—Rootworks Grow™. Grow is our cloud platform designed to offer and do the following:

- **Modern Firm GPA tool**
- **Education resources tied to each GPA component** to lead you and your team down a path of continual improvement
- **Benchmarking** with hundreds of like-sized firms
- **Project management** designed to help you and your staff keep your “Working ON the Firm” projects on track
- **Staff onboarding and training**
- **RW Connect™**—peer-to-peer communications platform
- **Website management tool**

Working IN the Firm (Business Model)

This is the area of practice that is supported by the most solutions—including tax, practice management, client accounting and payroll. The following chart highlights solutions that support a few of the most important trends (mentioned earlier) as well as additional systems that support the growing area of client accounting and payroll.

### Data Security
With 91 percent of cyber crime initiated via email, solutions that minimize the use of email have grown in popularity. Emails fall into three primary categories: 1) Client, 2) Staff and 3) Other. For each, there is a recommended solution and/or best practice:

- **Liscio**
  - For client emails: Liscio includes a communications platform for staff and clients to interact. This solution is robust beyond communications as well. Visit liscio.me to request a demo.

- **Slack**
  - For staff emails: Slack is an internal staff-to-staff communication tool that is far more effective than email. Slack significantly reduces internal emails via instant messaging and mitigates the need for meetings by allowing teams to collaborate in open channels.

- **KnowBe4.com**
  - For other emails: This is a training tool developed to support a firm’s security awareness program. It helps staff to stay apprised of email scams and security risks that continually pose a threat to firms.

### Client Accounting
Leading client accounting solutions take full advantage of collaboration capabilities via the cloud. Any product that doesn’t offer this core functionality should not be considered:

- **QuickBooks**
  - This powerful online solution should be the cornerstone of your client accounting practice. QB is the market leader and innovating at a rapid pace.

- **Bill.com**
  - This is the leading bill pay solution in the profession and highly regarded as a value-add workflow tool. Equally important, Bill.com is known for superior security features.

- **Fathom**
  - Is a powerful dashboard/reporting tool that integrates seamlessly with QB. Fathom allows Modern Firms to deliver data in a highly visual way for ease of interpretation.

- **Right Networks**
  - A leading hosting service, Right Networks supports the QB Desktop product, eliminating the need for data backup files and supporting collaborative access.

### Payroll
Your payroll solution depends on the model that best fits your firm. There are three core payroll models to consider: 1) Hands-off, 2) Hybrid and 3) Full-service.

- **Hands-off model**
  - There are solutions available that allow firms to outsource payroll to a trusted source. Firms must be responsible, however, for providing clients access to their payroll data.

- **Hybrid model**
  - This option allows firms to maintain control of client payrolls while relying on advanced, automated technology to handle the compliance work, such as direct deposits, tax deposits and filings, and W-2s. This offers a sound alternative to paying for more expensive in-firm technology while reducing staff time due to automation.

- **Full-service model**
  - This option supports the traditional payroll model where the firm handles all aspects of the payroll process.

There is not a right or wrong payroll model for the Modern Firm. It’s about identifying the model that best supports your core competencies and vision. Once you make that decision, you can begin to analyze which solution is most effective at powering your collaborative process.
## Working WITH the Client (Touchpoints)

Working WITH clients has evolved into one of the most important elements within a firm, and yet it is the least supported area by vendors. The following solutions are recommended to support your Working WITH efforts and elevating the client experience.

### Online Platform

The Modern Firm considers its website as an online platform—a place for clients to connect and do business with your firm. As such, your online platform needs to be flexible, offering the ability to integrate third-party solutions. For example, video conferencing, appointment scheduling and making payments. It must also support online completion of forms and initiate logins to various third-party solutions that make up your business model—such as QuickBooks, Bill.Com, Liscio and Fathom.

### Liscio

Liscio adds great value by enhancing the client experience, offering a mobile application, the ability to send notifications when work in process is complete, and collect digital signatures. Liscio also redefines the way you onboard and communicate with clients. You can securely share documents back and forth, clients can request appointments with their service team, and update basic information in their client record directly from the mobile app.

### Zoom

Zoom is a leading video conferencing tool that offers ultimate convenience to busy clients and a much higher level of client experience than the phone. Zoom is the solution of choice over products such as Google Hangouts and Skype because it doesn’t require the client to register an account—it’s low-friction.

### Google Drive

Google Drive satisfies today’s clients who no longer want to log into various vendor portals, but rather want to access information in a single location. Modern Firms should be training clients to securely receive and store documents in the cloud. Clients will appreciate your insight and help in organizing their digital lives. Note: iCloud, Box, Dropbox and OneDrive could also be listed here.

## The Path to the Modern Firm Begins Here

In the preceding pages are outlined a pathway to transform your business into a Modern Firm. At its core, the Modern Firm is about surviving and thriving in the coming era of technological disruption—while at the same time preserving your freedom, relationships and creativity.

Just like me, you innately have creativity within you, and there is a great sense of satisfaction when you have the freedom to apply that creativity to building your business and the relationships that support it.

I’m passionate about helping you make this shift and seeing your firm thrive. I hope you’re just as passionate about creating your Modern Firm. Visit us at [rootworks.com](http://rootworks.com) to see more.
Work ON your business, and GROW.

Rootworks GROW™—It’s the online platform that serves as home base for working on your firm and getting the most from your Rootworks membership. From assessing your Modern Firm™ GPA, to benchmarking, networking, education resources and more, it’s a platform that empowers you as a leader and helps you shape your firm’s culture.

GROW—it’s what you do as a Rootworks member. Join now.

Now there’s a better way to

onboard clients,

communicate securely,

go mobile,

manage tasks,

and work with your clients.

Cloud-based Liscio. Work smarter, deliver the modern client experience.

Schedule a free demo now at liscio.me