

DeLeon and Stang Successfully Transitions to Working Remotely



Like most accounting firms, DeLeon and Stang, faced a challenge when employees needed to work from home in March 2020 to protect themselves and their families from the COVID-19 pandemic. The firm has 43 employees year-round and 48 during tax season, but until the advent of the pandemic, only one employee had worked at home full time.

As the threat of COVID-19 grew, most of the firm’s employees moved to working at home full time, although DeLeon and Stang offices remained open given the firm’s status as an essential business in Virginia and Maryland, the states where it has physical locations. A Right Networks Cloud Premier customer since 2011, DeLeon and Stang made the transition to remote work effortlessly and without disruption.

Right Networks spoke with Jeanie Price, partner and director of administration at DeLeon and Stang, about how Right Networks Cloud Premier enabled the firm to adjust to remote work for the duration of pandemic-related disruptions.

Right Networks: How many of your employees are now working from home?

Jeanie Price: Between 30 and 35 work from home. We still have a couple that wanted to go into the office. We have an employee in Boston who is totally remote, but everybody else has always worked in an office.

Did employees all just go home one day, or was it a slower process?

It was a slower trickle. We had some people who were concerned, and it started building from there. Somebody would come in coughing, and the next day five people would say, “I’m going to work from home.”

What were some of the challenges the firm faced as employees transitioned to remote work?

Transitioning was quite simple for us. We had to ensure that everybody had the right equipment at home. If they didn’t have the equipment, we told them to take it from the office. As far as connectivity, the biggest thing was making sure employees could connect using home internet. Because we’d been in the cloud, we knew everything would work well. We knew we could work through concerns, but we really didn’t have any.

How did employees react to working remotely?

From their perspective, nothing changed. Everything worked. We have a good rapport with the team. We’ve found ways to keep everybody engaged virtually. We use Microsoft Teams extensively. We’ve used Zoom for virtual happy hours and bingo. We’ve played Kahoot, and we had a speaker come on and do some virtual improv.

How did clients adjust to working with you virtually?

Clients had to make some adjustments, but we communicated with them the whole way. We didn’t want them coming by the office to drop off forms. They had to adapt to a digital method of sending us tax records, but we were able to handle that with portals and secure email exchange. We have TaxCaddy, which actually makes it easier for clients to send their documents to us via upload than what they were doing previously. A lot of them were pleasantly surprised at how easy some of those processes were. We have one Partner that had been scheduling up to 15 in-person appointments a day and that had to change. We also have a significant number of older clients who struggle with interacting remotely, but we were able to walk everybody through it. We’ve gotten a lot of kudos for how easy it was.

Why would you recommend Right Networks Cloud Premier to other CPA firms facing this challenge?

It’s a right fit for a lot firms because you have relationships with vendors and can get to the root of the problems quickly and easily. It’s the right setup; your infrastructure is right, and your people are trained. Right Networks Cloud Premier allows us to do everything seamlessly. And the team at RightNetworks is great to work with. They are well trained and patient with our users, and work to solve the issues to the best outcome. We are in constant communication with our client services manager, so we know of the changes going on at Right Networks and can communicate our needs on a regular basis. ➔

The DeLeon and Stang tech stack hosted on Right Networks Cloud Premier includes:

- Tax:** UltraTax by Thomson Reuters
- Time and billing:** Practice CS by Thomson Reuters
- Audit:** Advance Flow by Thomson Reuters
- Document management:** iChannel by Conarc
- Accounting:** Accounting CS
- Bookkeeping:** Intuit QuickBooks
- Messaging and productivity:** Microsoft Office 365

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