How to change your practice management software: the ultimate guide
The pace of change in accounting – and accounting software – never ceases to amaze me. But whether it’s easy or challenging to adapt varies from person to person.

Some people might find big organisational changes overwhelming, whereas others might shrug off company restructures but baulk at having to sit somewhere new.

This variation in how people react is one of the main difficulties when it comes to change management for organisations. This guide is designed to help firms manage software changes in their practice and make sure it doesn’t feel like a leap into the great unknown.

When it comes to implementing new software, it can be easy to fixate on the idea that it’s all about a shiny new tool, but, at its core, change is about helping people bridge the gap between where they are and where you need them to be.

This guide is intended to be applied to your practice but you might also find it useful for your clients. With that in mind, we’ve kept this as principle-based as possible so you can create change in your firm and also support your clients through whatever changes are happening for them.

Guy Alexander
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Chapter 1: The importance of having a growth mindset

Change isn’t always easy and people often resent it. In a traditionally conservative profession like accounting, this is doubly true.

But change is one of the only constants in life and right now, the world of accounting is changing more than ever.

So when it comes to changing your accounting practice, you have a choice: lead it and embrace it, or ignore it and get swept up anyway.

This guide is for forward-thinking firms that understand the need for change but don’t necessarily know the first steps to take. Even for people who are comfortable with change, altering habits can be hard.

If you’re part of a firm that’s done things the same way for a long time, change is about much more than just buying new software: it’s about rebuilding the way your firm operates from the ground up.

This might sound daunting, but firms that take a transformative approach to changing their practice management have an easier time than those that take a more piecemeal approach. The transformative approach can also be incredibly rewarding for practice principals, staff and, most importantly, clients.

Play to your strengths and the strengths of the practice management software

Having a growth mindset is important when it comes to software implementation. It’s human nature to ignore the strengths of a practice management solution and focus on the weaknesses. But the fact is that no new software will mesh exactly with existing processes and organisational habits.

And while it’s important for your practice management software to be flexible enough for your firm, it’s also vital to organise your new processes around the strengths and core functionalities of the software.

When you’re changing practice management software, don’t expect a like-for-like replacement. Workflows will often need to change in order to adapt to new technology, so the key is to always look at the bigger picture. If spending five more minutes doing X means you save 25 minutes for Y, then overall it’s a net win.

Case study: PKF Hamilton, New Zealand

Hamilton firm PKF began their Xero Practice Manager (XPM) implementation when they were merging one practice with another.

As the merger concluded, they found themselves with an excess of duplicate data, which served no purpose and clogged up their systems. PKF’s solution was to start afresh – and with XPM.

“If you start with a clean slate then what do you need to run your firm? The real basics. Get it down to the absolute core and build it up from there,” says Glen Martyn, PKF director.

“If you bring across the old and try to do what you’ve done in the past, you won’t embrace the change and you won’t enjoy the experience as much.”
Take action: 🔄
How efficient are you right now?

To understand where the efficiency gains are to be made with your new practice management software, you need to measure your existing processes.

- Identify all the regularly followed processes and clearly defined tasks in the management of your practice, like entering timesheets or preparing invoices.

- Record or calculate how long these tasks currently take. Be sure to get a real picture rather than an idealised one – timesheets often hide inefficiencies that are not immediately apparent.

- Ask yourself, in an ideal practice management scenario, which processes would either be eliminated or made more efficient? Write down how long you’d like these set processes to take and how the firm would be impacted if these efficiency savings were implemented.

- Ask staff for their opinions. They’ll have the best understanding of the firm’s current pain points, and many will already be sitting on ideas about how to make the practice more efficient.

Going through this process will tell you how efficient you are now, and will allow you to calculate efficiency gains when the new practice management system is implemented. When greater efficiency is the new normal, it’s important to be able to look back at what it was like before.

Take action: 🔄
Changing practice management is an opportunity

1. An opportunity to update processes
What are your current workflow processes? How and why were they developed? Chances are, many of your current processes were developed to fit the constraints of your existing technology solutions.

2. An opportunity to clean up data
How old is that client database? What else in your firm suffers from dirty data or poor organisation? When was the last time you really needed to open that filing cabinet? Take the opportunity to clean it up and ensure only relevant and current client information is being used in your practice.
Case study: WK, Marlborough, New Zealand

As the first large, multi-site firm to use the full Xero practice suite anywhere in the world, WK felt like they were stepping off into the unknown when they began their implementation six years ago.

Combining their new software approach with a firm-wide strategic planning process helped them get it right. They started with the team of directors deciding on new practice values.

“We decided that we really liked ICE to stand for integrity, caring, and excellence” says WK director Hamish Morrow.

But when the directors took the values to the staff, they faced an unexpected, if low-key, revolt.

“The response we got was, ‘That’s not WK, that’s not what we’re all about – that feels really cold. Are you sure you’ve got it right?’” says Hamish. “We were a bit taken aback, so we said, ‘If you think you can do better, go for it.’”

Collaborating with the staff, they came up with a new set of foundational values for the firm: accessibility, dedication, vibrancy, integrity, caring and excellence, to get the acronym ADVICE.

WK partner Neil Sinclair says that moment was transformational for WK because it put advice at the centre of everything the firm does. And the values rethink wasn’t just a feel-good exercise, it was critical to the success of the new cloud-based practice management approach.

“We continually strive to be innovative, look at new technologies, and implement them into the practice as soon as we can,” says Neil. “We really think those tools add value for our clients.”

Take action: Focus questions

For those looking at making a significant change to their practice management, answer the following questions:

• What is our vision?
• What values matter most:
  – to our firm?
  – to the clients we want to work with?
• What is the end goal?
• What do we want to achieve with the move?
• What does success look like?
• What’s in it for the team — owners, partners, and staff?

Once you have some answers, take them to practice staff to get their input and help refine the vision. This can be the start of a long process, so consider hiring a facilitator or an outside agency to help.

Chapter resources

Accounting-specific resources that talk in-depth about changing practice management, software, and organisational habits:
The Pacesetters by Doug LaBahn and Josh Drummond
The Pacesetters: Advisory by Doug LaBahn and Josh Drummond

Great resources for understanding the psychology of change resistance and forming new habits:
Thinking Fast and Slow by Daniel Kahneman
Mindset by Carol Dweck
Atomic Habits by James Clear
Chapter 2: Developing a plan for your firm

Every accounting or bookkeeping practice is different and your practice management plan will have to take that into account. After you’ve taken the actions outlined in the last chapter, you’ll have a clearer vision of where the firm is going and why you want to get there. You should also have a greater understanding of how efficient your firm currently is, and a better idea of what needs to change.

Once your vision starts to come together, it’s a good idea to open it up to practice staff to get their input. The earlier you involve staff, the better, as the more say they have, the more they’ll feel a sense of ownership about the firm’s direction. They’ll also be more engaged with the change, whatever form it takes.

Make big changes in small stages

It’s normal to see a big change as a hurdle, something to struggle over. But it doesn’t have to be if you make the change into smaller, more manageable pieces.

It’s like the saying: how do you eat an elephant? To which the answer is: one bite at a time.

If you package up your change into bite-size chunks, and create a staged implementation with milestones that can be celebrated as they’re achieved, you’re much more likely to get buy-in from all of the firm. The more visible you can make these milestones, the better they’re likely to be received.
Find natural times to make change

Throughout the year, every practice will peak and trough in terms of how busy it is. And it makes sense to avoid making big changes during your busiest periods – you don’t want staff to have to learn a new system while they’re managing the end of financial year.

Introducing big changes during quieter periods is often a good idea, but it’s worth noting that there are times of the year where change happens naturally. For example, holiday periods are often quieter but also periods of natural churn and staff turnover, so it helps to plan your change roadmap to take this into account.

Regardless of which approach you take, make sure you balance the necessity of change with the stress that it will create, and consult with staff on the appropriate roadmap and timings.

Case study: PKF Hamilton, New Zealand

Like many accounting firms in New Zealand, PKF essentially close down operations in January each year. The year they switched to XPM, Glen came back early and moved all their data into their new system while other staff were still on holiday. When they came back to work, the new system was in place.

Glen says this method of transition meant that staff were able to start learning the basics of the new system on the first day back, including how to do their timesheets and where to find client database information. From the start, training was available on everything they needed to know, and all the new or unfamiliar elements of the software were broken down into small steps.

“We didn’t try and train them on everything the software could do on day one,” says Glen. “Stepping stones were a nice way to transition them into the product. They got to do their own timesheets and there were three different ways available in XPM. We let them explore all of those, and find out the best way so they enjoyed doing them.”

At the end of the first month, invoicing and billing came up naturally, and extra training was offered. PKF made sure they gave staff flexibility around how they learned the new system, and ensured that training (and certification) was available each time a new skill needed to be learned so they never felt under too much pressure.

“We made it as seamless and simple as possible for staff, so it wasn’t a headache or a lot of extra work involved,” says Glen. “So all the pain points that they thought were going to happen, we found a solution to ahead of time. We drove the focus forward, so they could get back to just doing the job they normally do.”

In their second year on XPM, there was a huge swell of feedback from staff.

“They were saying, ‘This is the best thing we’ve ever done. Oh my God, this is so much easier. This is way better than what we’ve always had in the past, and we can really pump out jobs now, so much more efficiently and quickly.’” says Glen.
Take action: Start mapping out the route

When are your busiest times? When are your quiet periods? And when are your times of natural change?

Take note of when you expect WIP balances to be low, and mark these times on a calendar. These are your opportunities to introduce changes that require more education or ‘bedding in’. Identify times of year when changes naturally occur in your firm and decide which changes you could introduce concurrently.

Count up your client databases and sources of truth

Make a note of how many client databases you have. This will help you identify areas for administrative efficiencies and help you spot potential pitfalls. What implications are there for your corporate compliance, super funds, or other databases?

What databases can be consolidated, integrated, or eliminated, to increase simplicity and efficiency? And are there databases that cannot be replaced or amalgamated or need to stay as is?

Specify a cut-off date for the last major work you’ll do in your old system

Ahead of actually making the switch to new practice management software, bill out as much as you can from your existing system so there’s less data to migrate.

Take action: Focus questions

Should we migrate data from our current practice management system or start from fresh?

For some practices, a more gradual transition from old software might be the best way. For others, a blank slate can work wonders for the firm. There are pros and cons with both approaches, so during the planning phase, finding the best way for you and your staff is critical.

If you don’t migrate data, do you have a copy of it elsewhere? Can you migrate the data later? What and what isn’t critical to migrate? Will migrating data add value to your firm or slow you down?

Will staff and customers be receptive to a pilot programme?

Consider running a pilot with a group of existing clients to iron out all the processes before you roll the new system out to everyone. Find a staff member who’ll feel comfortable running the programme and identify customers who’ll be happy to be guinea pigs – giving them a reward will probably help!

Xero has your back: Understand your level of support

Once a firm begins its cloud adoption, they often see the need for new practice management processes. Xero has helped many firms make this transition, and has specialist staff to help you every step of the way.

Your Xero account manager

Your account manager is the first port of call for any new change management project involving cloud software. They have the materials and training you’ll need access to, and for smaller firms and those with less specialised needs, they’ll be able to help guide you through the transition themselves. For larger projects, they’ll be able to help you bring in specialist resources.

Partner consultant

A partner consultant is an expert who educates accountants and bookkeepers on Xero partner tools. They migrate data from legacy practice management products into XPM, implement XPM and advise on best practice processes.

A partner consultant will also train your team on using Xero partner products tailored for your firm, as well as providing post-implementation support.

Certified implementation partner

A certified implementation partner is endorsed by Xero to implement XPM. They can help with change management and will typically implement other apps that integrate with XPM.
Chapter 3: Getting buy-in from your staff

When it comes to getting your staff to support and embrace change, it’s helpful to remember Dale Carnegie’s quote from his book *How to Win Friends and Influence People*: “People support a world they help create.”

It’s as simple as that. Ensuring that your staff are on board with your change plan is critical to making it a pain-free exercise.

**Identify pain points and make changes to fix them**

There’s no point in making change for the sake of it. Your staff will resist change if they see it as a symptom of needing to be on-trend or keeping up appearances. Often, practice principals assume staff will be as enthusiastic about new software and processes as they are. However, what motivates staff is not always the same as what motivates their boss.

If you can position the changes as an opportunity to fix the problems that staff find most pressing, they’re much more likely to be enthusiastic change champions. Make sure that staff understand the positive impact the change will have on them, and ensure that they have the ability to ask questions and – vitally – challenge the new software during the decision-making process. The best solution in the world will always fail if users don’t believe in it or don’t want to learn how to use it.

**Mistakes will be made. Avoid the mistakes you can, and embrace the rest.**

Make sure you give staff plenty of latitude to experiment and make mistakes in the short term with the new software as this is how people learn best. Chances are they will need to migrate or update some data, and this means they’ll naturally take longer to finish some tasks to begin with.

Penalising staff by holding them to their normal productivity targets is demoralising, and it discourages them from truly learning the best features of the new software. The old processes are unlikely to work with your new software, so give staff space to explore new features and time to learn how to use them effectively.

This is one of the reasons why it’s so important to make changes to practice management software at times of natural change or during quiet periods, so there’s less pressure to cut corners or do things the old way.

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**Case study: Nexia Perth, Australia**

Nexia is a mid-tier accounting and advisory firm in Western Australia with clients ranging from small, owner-operated businesses to large corporate entities. Their practice management tool had to be able to do it all, but first they needed to implement it. To be successful, the whole firm had to be on board.

“It was a big change management project,” says Susan. “We launched the Countdown to Xero campaign eight weeks out from the go-live date, with weekly updates and a launch party on Day Xero.

“Being a multi-disciplined firm, each team’s service lines operate differently with the team’s clients, so we had champions and user groups from each team. Feedback was critical and utilised to create the optimal solution.”

Because of the size and complexity of the migration, Nexia partnered with a specialist cloud consulting service who had in-depth knowledge and experience of the functionality of XPM.

“Theyir assistance with data migration, setup and training was invaluable. They knew the capability and functionality of XPM back to front,” says Susan.
Create change champions out of your staff

Once you’ve developed a plan as outlined in chapter two, you will have identified a few staff members who would be capable of embracing and leading change. These people will be your change champions and will be crucial to your practice software switch.

How many champions you need will depend on the size of your practice. Smaller practices will get by with just one, whereas larger practices may need a handful, each with a different speciality. The one constant is that no matter the practice, and even if you have outside help with your practice management transition, you need internal champions.

A champion might be your brightest, most cloud-savvy employee, or they might be an old hand who knows the practice operations inside-out. Many firms will find it beneficial to create a team of champions that contains a mixture of old and new skills.

In order for software champions to be successful, they need to be:

**Trained:** Champions need to know the software in depth before it’s implemented. This can mean training courses, certification, away days, and extra hours. Champions should not be obligated to do the usual fee-earning work. They can still put in some time, but they need to be fully trained to be able to offer a benefit to other employees and practice principals need to realise that this will take a significant proportion of their time.

**Available:** This too is time-based – champions will spend a large proportion of their time helping and training others, and putting out fires when they appear. Being tied to fee-earning will restrict their availability, so make sure they have all the time they need. They should also be available to work with software providers and implementation consultants to pass on feedback and find solutions for staff issues.

**Empowered:** Champions need to be able to create further change, rather than just acting on orders from above. They will be a crucial go-between for staff and principals, as well as any outside help you have for the transition. As such, ‘champion’ needs to be a role that’s recognised by staff and principals.

To enable champions to do their job effectively, they need to be able to recommend the best course of action and make decisions on the fly. Make sure that other staff know and understand this extra responsibility, and ensure that you, as a practice principal, are open to their feedback. The champions are your sergeants in the field – they’re there to implement the vision, but you need to be flexible to changes in approach if your champions recommend them.

**Rewarded:** Being a software champion is an extremely demanding job and is crucial to the success of your change management project. Champions need to know that their efforts will be recognised and rewarded in the firm. The reward should depend on what the champion wants out of their career at your firm. If you have ambitious juniors as champions, this can be a path to promotion. If it’s an old hand, maybe an extra week’s leave is in order.
Take action: Get buy-in, plan, and create your champions

Your practice software implementation plan is unique. It should suit the needs of your particular practice and people. It’s time to identify who will contribute, and in what way.

Identify pain points and people before making major changes

Every practice has pain points, and some people who are more change-averse than others. Sometimes people dislike change because they have developed a set of skills to circumvent pain points, or they might be worried that the new software will replace them or their skills.

While this might be true, it doesn’t need to be a downside. You can help them find something new to be experts at and they can often be assets during times of major change because if you can win their support, others will follow them. These people often make excellent change champions.

Talk to your potential champions

Have a good chat to those staff members who you’d like to champion change about the role and rewards of their position. Bring them in on what you hope to accomplish and how they’ll play a part. Find out how they want to use the experience for their careers or what else they want to get out of it. Finally, understand how best to reward them for the extra effort they’ll be putting in.

Create a list of stakeholders.

This will include:
- the practice principals
- the previously-identified change champions
- your Xero account manager (and any other Xero stakeholders)
- any software vendors who are involved
- any change consultants you are working with
- representatives from other practices who’ve made a similar transition

There may be even more stakeholders. Rank them in order of importance when it comes to getting the new software running. Then draw up what each person’s responsibility might be in the upcoming change. You’ve now got the foundation of your change team.

Bring the stakeholders together for an initial meeting

Once you know who your change team are, it’s a good idea to bring as many stakeholders together as possible for a kick-off meeting. Use this opportunity to explore what roles stakeholders see themselves taking during the transition. When you’ve established their core competencies you can develop a detailed change plan.

Take action: Focus questions

What KPIs will we use to measure change champions’ performance during the implementation?

Change champions are vital to a successful implementation, so the last thing we want to do is penalise them for the time they spend on the implementation. It’s unrealistic to expect them to have the same amount of time to dedicate to client-facing work, so this should be reflected in the KPIs used to measure their contribution and value to the firm during this period.

How often will change champions collaborate with key stakeholders?

Set up-front expectations for how change champions will be expected to engage with stakeholders, so there’s transparency and accountability throughout the process. How often will they speak to staff to seek feedback? Who needs to be kept up to date with progress?

This will depend greatly on the size of the firm and the length of the implementation; however being able to plan the internal communications schedule in advance will help keep the momentum going, and make obstacles easier to identify and address.

Chapter resources:
The Pacesetters by Doug LaBahn and Josh Drummond. In this book, we go into more detail about the different ways your practice can create software champions. The chapter ‘The Cloud Champion’ is a must-read for anyone looking to engineer change champions in their practice.
Chapter 4:  
Go live and get going

The go-live date is the most important day in your staged implementation calendar – everything else revolves around it. To ensure that your go-live goes smoothly, make sure that everyone knows what’s expected of them in the lead up to this date, on the day itself, and post-launch.

The lead-up to go-live

As we’ve seen in the Nexia Perth case study, keeping everyone across the buildup to go-live is important to a successful implementation. Nexia had a ‘countdown to Xero’ that was run by their external consultants and internal champions, and which was consistently reinforced to staff through posters, emails, and in-office events.

Your practice management software is integral to the success of the practice itself, so everyone needs to be fully aware of the change and the part they’ll play in it. Structuring the day-to-day of the practice around the upcoming change is a great way to make sure the focus is where it needs to be and will help ensure a smooth changeover.

Creating a contingency plan

If anything is assured, it’s that not everything will go according to plan. Keep this in mind and take contingency planning seriously. Allowing for things to be bumpy helps smooth the road in the long run, and understanding what can go wrong often increases the overall knowledge of both the software and the practice.

Work closely with your Xero account manager and any other software vendors or stakeholders to create contingency plans for the most likely scenarios, based on their knowledge of what’s happened during implementations at other practices.

Then give contingency responsibilities to your change champions and staff, depending on their level of expertise and their role, both in terms of their place in the practice and in the practice management change exercise.

Contingency planning focus questions

• How’s our implementation similar to other practices?

• What problems did other practices experience with implementation?

• How did they deal with them?

• What can we learn from this and how can we deal with them?

• What is different about our implementation from other practices?

• Is the difference essential or optional?

• How can we allow for this difference?

This list of questions should produce a number of contingencies. Once you have these, you can assign responsibilities to those best placed to deal with each of the contingencies you have listed.

Practice principals are responsible for other people’s responsibilities

Once the contingencies have been assigned, it’s the assignee’s job to create and take ownership of their own sub-plan – not yours. Unless you’re a sole operator, you can’t micromanage a contingency.

However, as a practice principal, it’s your responsibility to make sure that others know what their responsibilities are and they do what’s assigned.
Go-live day

The details of go-live day duties and who will be doing what should be sorted out in the specialised plan you develop with your Xero account manager and other stakeholders.

We can help you make go-live day memorable for all the right reasons. From a software perspective, an ideal go-live day is anticlimactic. In the best-case scenario, everyone knows what’s expected of them and understands the new software well enough to start using it without any major issues.

It’s important, therefore, to build a sense of climax and achievement into the go-live day. Don’t be afraid to get theatrical. Consider a balloon drop, a team prizegiving, an early finish time that Friday, an office party, or something bigger down the line. You’re making a huge change and helping ensure the future of your firm, so you should celebrate it.

After go-live day is when the real work begins – the day-to-day of operating with new practice software, and potentially a new structure – which we’ll cover in the next chapter.

Case study: Emmerman Boyle, US

David Emmerman and Kevin Boyle needed a resilient practice management solution that would scale with their practice and give them the power to run the firm the way they wanted. XPM was the answer.

They started the change to the new software by capturing the current state of their firm, documenting every process that took place across each of their six offices.

They outlined all the tax, bookkeeping and reporting processes from beginning to end, identifying roadblocks and how they could serve their clients better. Once improved processes were defined, they began implementing them in XPM.

“We had documented the heck out of everything. We built some great workflows, and job and task templates within XPM,” says David.

Once this was done, they were able to begin rolling out the processes across the whole firm.

At the same time, they needed to make sure their staff were on board. A support structure and coaching were put in place to help the Emmerman Boyle staff get it right first time. This, David says, was crucial to starting the XPM implementation on a solid foundation.

“Having the entire team track their time in a consistent manner within XPM gave us a level of visibility we had been missing – because it was accurate and we trusted it.”

Since implementing Xero and XPM, Emmerman Boyle’s monthly engagement has quadrupled in value, while profitability on cloud clients has soared.

“We’re building a much more value-added service offering,” says David. “And we’re leveraging the technology to drop our costs in order to be able to deliver a higher-end product.”

XPM has also given David and Kevin the ability to identify where team members are falling short and where they excel. Teams can then be structured according to their strengths: compliance-oriented team members can spend more time doing tax work, whereas those who enjoy face-to-face contact with clients can do more advisory work.

Greater visibility of employee performance across the practice enables the leadership to effectively manage internal teams and put in place proactive coaching for employees who may be falling behind.

“It’s not always about having to release team members,” says David. “It’s about coaching and putting them in a spot to be successful.”
**Take action:**

**Going live**

- **Identify issues as you go**
  Doing training before the go-live date is great, but it’s much easier to learn by doing. As soon as staff are using the new software, encourage them to keep an issues register where they can log all feedback. Then it can be addressed in regular team meetings, ideally with the software vendor there, to answer questions and advise on best practice.

- **Be open to changing your configuration or processes after you’ve gone live**
  This is a natural part of the process. Firms may have an idea of how they want a software configured – often they want to try and replace existing processes – but then realise that the new software can offer better processes than the ones they had before.
Chapter 5: Reflect

Changing your practice management software and processes is only one step on a longer journey for your practice. But it’s a big one, so while the changes are bedding in, take time to reflect as a practice.

Be prepared for disruption during this period. While there will definitely be some quick wins, things won’t be smooth sailing immediately and this could cause some doubt among the team. Remind them that the software switch is just one step in the process – making it work properly for the business will take time.

If you’ve been encouraging staff to note feedback throughout the process, it’s a good time to ask them how they’re finding the changes. Don’t be discouraged if the feedback is mixed, or even if some don’t like it – change is inherently difficult. Give it time to bed in and make sure your team know they have a voice and their feedback is being taken on board.

Don’t be put off though! There will be wins early in the process too – and even if they’re small, try and find a way to celebrate them, as even when change goes smoothly, it can be mentally taxing.

By recognising and celebrating both the big and small, your team will feel more positive about the new software and will encourage good performance as you take the next steps on your journey.

Take action: Get good feedback and make the most of it

Organise regular check-ins with staff and software vendors

Have regular meetings with staff where they can raise any issues they’re having. Do the same thing with software vendors.

Ask for specifics

It’s crucial to ask team members for details of the issues they have. Vague concerns can’t really be dealt with, but specific problems or concerns can. Take note of them, and decide how to deal with them.

Put a bounty on bugs

Instead of avoiding problems with the new software, seek them out. Encourage your team to find and submit any bugs or process problems and reward them for doing so – especially when they’re able to contribute to the solution as well as finding the problem. This helps reinforce the fact that you’re all in the business of making this work together.

Use your issues register

If your team has been keeping an issues register, you can use it to rank concerns. Group common issues together and tag the issues with supplementary information, for example:

- How big is the issue? It can be helpful to assign a t-shirt size system here to help clarify the scale of each issue, eg, from S to XL.

- How much does the issue impact people, and how much does it impact the business?

- How easy will this issue be to fix?
Case study: Emmerman Boyle, US

The result of Emmerman Boyle’s switch to Xero Practice Manager was a 30% to 40% overall efficiency gain for the firm.

Tax return and compliance work has become far more efficient since the XPM implementation, resulting in a huge improvement in profitability. With a robust platform and solid processes, the firm was able to reduce its labour input costs by an average of 30% to 50%.

“It’s not just because we’re doing the same work that we were always doing, but we’re doing it better and faster,” says David.

Thanks to XPM, the firm is able to clearly identify time spent per client and can see when the time spent is higher than expected. When this is the case, having high-quality data means staff can have a productive conversation with the client.

“You can go to the client and say, ‘We love you, and we want to continue to support you, but this is what we’re worth, and this is what we need to get to,’ and you’ve got the data behind you to have that conversation,” says David.

Happier people

Some accounting firms are in a more or less constant state of writing down work in progress, as clients are known to baulk at a big bill. Other firms just send the bill anyway, risking an unhappy client shopping around for a new accountant, or simply not paying the bill.

XPM has helped them avoid either situation, by giving Emmerman Boyle the ability to benchmark new clients against other clients in similar industries, and price accordingly, avoiding a surprise bill scenario.

David says that changing practice software is also a chance to review your practice management.

“I would say that it’s a great opportunity to really step outside the business and look at it,” he says. “Many firm principals spend a lot of time putting out fires. Implementing Xero Practice Manager is an opportunity to treat ourselves like a client.”

Enjoy the rest of the journey, until you begin again

You’re never really done with change management, but after a time you’ll be used to the new software. What was once strange will be the new normal, and you’ll be enjoying the efficiency it’s brought to the practice.

Now’s a perfect time to start planning the next step on your change journey. What other areas of your practice could be improved by better technology and processes? Client onboarding? Corporate compliance? Document management? There’s a whole world of opportunity out there in Xero products and connected apps.

There’s a reason we keep referring to change management as a journey. Making a big change at work is a lot like going on a long hike or run. It can be a slog, and while you’re in the weeds you might wonder why you’ve taken on such a challenge.

But once you make it to the top, you take in the view from the summit and realise that it was all worthwhile.

In a world of constant, fast-paced change, there’ll always be another mountain to climb. How you respond is up to you. If you and your practice can come to see it as a welcome challenge, then it’ll enrich everyone who takes part in it.

Where you go next is up to you, but coming back to this guide will help you take the next step, whatever it may be.