

How To Balance Digital and Paper Workflows in Your Accounting Practice

A Step-by-Step Guide + Checklist



Contents

- The Paper Reality: What’s Really Happening in Firms Like Yours 1**
 - Understanding Digital-First Accounting: The Middle Ground 1
 - Why Digital-First Makes Business Sense 1

- The Human Element: Making Sure Everyone’s on Board 2**
 - Training staff and implementation 2
 - Meeting Clients Where They Are 3

- Making It Work: Your Practical Guide to Implementation 5**
 - First Things First: Setting Up for Success 5

- Conclusion 8**
- Checklist 9**
 - Phase 1: Assessment & Planning 9
 - Phase 2: Infrastructure Setup 9
 - Phase 3: Process Development 9
 - Phase 4: Staff Training 10
 - Phase 5: Client Communication (Ongoing) 10
 - Phase 6: Pilot Program 10
 - Phase 7: Full Implementation 10
 - Phase 8: Optimization (Ongoing) 10

The Paper Reality: What's Really Happening in Firms Like Yours

Everyone's talking about "going paperless" like it's the holy grail of efficiency. But here's the thing – despite all that enthusiasm, only [18% of businesses](#) have actually managed to go completely paperless. And you know what? That's perfectly okay.

Paper isn't your enemy – inefficient processes are. While going paperless might work for some aspects of your business, eliminating every piece of paper won't magically solve all your problems. What you need is a practical approach that works in the real world.

Understanding Digital-First Accounting: The Middle Ground

When you're digital-first, you're set up to handle things digitally, but you can still switch to paper when it makes sense. And when you do have to use paper, you'll prioritize digitizing those documents and processes as much as possible. It's all about being flexible and efficient, not rigid and dogmatic.

This strategy plays well with your current (and future) clients. Dawn Brolin of Powerful Accounting, a CPA who's been through this journey herself, [puts it perfectly](#): "Just because a client isn't paperless doesn't mean your firm can't be 100% paperless." This insight gets to the heart of what digital-first really means: meeting your clients where they are – rather than worrying about turning any away because they prefer one method over the other – while modernizing your processes.

Why Digital-First Makes Business Sense

Let's talk about what digital-first can really do for your firm.

Working from Anywhere

Your team can access files whether they're at home, in the office, or catching up on work at their kid's soccer practice.

Better Client Service

When a client calls asking about that receipt from three months ago, you can find it in seconds instead of digging through filing cabinets.

Peace of Mind

Every paper document gets digitized immediately, so you're protected if anything happens to the original. No more panic attacks when the office sprinkler system goes haywire!

The Human Element: Making Sure Everyone's on Board

While new software and systems are important, it's the human element that will make or break your transition. Whether you're dealing with a skeptical staff member or a paper-loving client, how you handle these relationships will determine your success.

Let's explore how to get everyone on board while keeping your firm running smoothly.

Training staff and implementation

Your digital-first strategy will fall flat without enthusiasm from your employees. You may have some employees who roll their eyes if you ask them to work with a client who brings in paperwork. On the other hand, if your firm is used to working with paper, you may have employees who have difficulty changing the processes they're so familiar with. As Dawn shares from her experience: "People would be surprised how quickly staff can adapt to scanning and organizing digital documents. If you set up consistent processes, your staff will actually love it because they can find everything so much faster."

Here's a play-by-play on how to engage your team and roll out this new workflow:

1. Training staff on processes

Build an easy-to-understand training protocol for your new processes. Confusion during the implementation phase of your new workflow can lead to frustration, which can translate to resistance and potentially costly errors.

2. Managing resistance to change

Your staff may not be interested in transitioning to a digital-first workflow. Some employees may consider paper documents outdated, while others may not be interested in straying away from traditional practices. Keeping your team's feedback in mind and providing reassurance can reduce pushback and boost overall buy-in.

3. Taking quality control measures

Any change to your workflow can open your team up to potential errors. While a digital-first strategy can improve your output and efficiency, there are measures you should take to avoid dips in quality during the transition period. Use these best practices:

- Create an internal system to ensure documents are properly scanned
- Establish a [consistent file naming](#), storage, and organization system
- Place checkpoints throughout your workflow to ensure documents have been processed and stored in a [document management system](#)
- Generate a tracking list of documents submitted vs those still pending



Meeting Clients Where They Are

In a perfect world, every client would be on the same page about paper versus digital. But that's not reality. Your clients have different comfort levels with technology, varying needs, and sometimes, strong preferences about how they want to work with you.

Understanding Client Hesitation

Why might clients resist going digital?

- Preference to work with physical documents
- Concerns about cloud security
- Limited access to technology or reliable internet
- Established habits and workflows that work for them

Here's the thing though – many firms overestimate client resistance to digital tools. Think about it: most of your clients already use banking apps, order food and clothing online, and manage their lives through their phones. ***The key is showing them how your digital-first approach makes their lives easier, not harder.***

Making the Transition Work

The foundation of any successful transition is open, honest communication with your clients. Take time to explain your digital-first approach and how it directly benefits them. Whether it's faster response times, enhanced security, or easier access to their documents, focus on the practical advantages that matter most to them.

Be upfront about the changes they can expect, but also reassure them that you'll still accommodate paper when needed. Setting realistic expectations from the start helps [prevent confusion and builds trust.](#)

Offer Options, Not Ultimatums

Nobody likes being forced into change, especially when it comes to handling their financial documents. Instead of taking a hardline “paperless or nothing” stance, create a flexible approach that works for everyone.

Some clients might be ready to go fully digital tomorrow, while others may need to maintain paper processes for certain documents. That’s okay – your digital-first approach can handle both. The key is being transparent about what you can and can’t accommodate while keeping the lines of communication open for feedback and concerns.

Support the Change

When clients show interest in going digital, seize the opportunity by providing the support they need to succeed. This might mean creating simple training resources or walking them through their first digital upload. Remember that what seems intuitive to you might be new territory for them.

Patience during this learning curve pays off in long-term client satisfaction and loyalty. Address security concerns proactively – many clients worry about the safety of their digital information, so be ready to explain your security measures in terms they can understand.

Handle Paper Efficiently

For clients who prefer to stick with paper, show them how your digital-first approach still benefits them. While they can continue providing physical documents, [explain how your internal digitization process](#) helps protect their information through secure backups and faster retrieval when needed.

Let them know about your security measures for both physical and digital storage. Often, seeing these benefits in action can gradually increase their comfort with digital options, leading to natural adoption over time.

A digital-first approach doesn’t mean digital-only. It means being smart about using technology while staying flexible enough to serve all your clients effectively. By meeting clients where they are, you can maintain strong relationships while gradually moving toward more efficient processes.





Making It Work: Your Practical Guide to Implementation

Your team and clients are excited about modernizing your practice, but where do you actually start? Let's break down the practical steps to create a system that works for everyone.

First Things First: Setting Up for Success

Before you invest in any new technology, take time to understand your firm's specific needs. Walk through your office (or virtual workspace), talk to your clients and staff, and notice where things slow down. Are your team members constantly searching for documents? Do clients regularly call asking for copies of old records? Are you running out of physical storage space?

Make a list of these challenges – both the obvious ones and the small irritations that add up over time. They'll help guide your technology choices and process changes, ensuring you invest in solutions that actually solve real problems rather than creating new ones.

Building Your Digital Foundation

You need the right tools in the right places, and everything needs to work together seamlessly. The foundation of your modern practice is a solid document management system (DMS) paired with reliable scanning capabilities.

SmartVault and ScanSnap [work together to create this foundation](#). While SmartVault handles the organizing, sharing, and securing of your digital documents, ScanSnap ensures that converting paper to digital is quick and accurate. This partnership means you spend less time managing documents and more time serving clients.

Creating Processes That Stick

The best technology won't help if your processes are unclear. One of the biggest decisions you'll face is how to handle incoming documents. Should you scan everything immediately, or process documents in batches? Both approaches have their merits.

The Immediate vs. Batch Processing Decision

Immediate scanning means documents get digitized as soon as they arrive. This approach works well if you have a steady flow of documents and dedicated staff who can handle scanning throughout the day. It ensures nothing gets lost or forgotten, and documents are available in your digital system right away. This can be especially valuable during tax season when quick access to client documents is crucial.

Batch processing, on the other hand, means collecting documents throughout the day (or week) and scanning them all at once. This can be more efficient in terms of staff time and might work better for smaller firms or those with limited scanning resources. However, it requires careful organization of paper documents while they await scanning and clear protocols for urgent documents that can't wait for the next batch.

Many firms find success with a hybrid approach – immediately scanning time-sensitive documents while batch processing routine paperwork. The key is choosing a system that matches your firm's workflow and volume.

Document Retention and Security

Once documents are in your system, you need clear rules for how long to keep them and who can access them. This isn't just about good organization – it's about legal compliance and client confidentiality. Create written policies that specify:

- How long different types of documents need to be retained
- When and how documents should be destroyed
- Who has access to different categories of documents
- How to handle sensitive client information

Make these policies clear to everyone in your firm and review them regularly to ensure they stay current with changing regulations and best practices.

Measuring Success

Look at the bigger picture of how your new system affects your operations and relationships.

Financial Impact

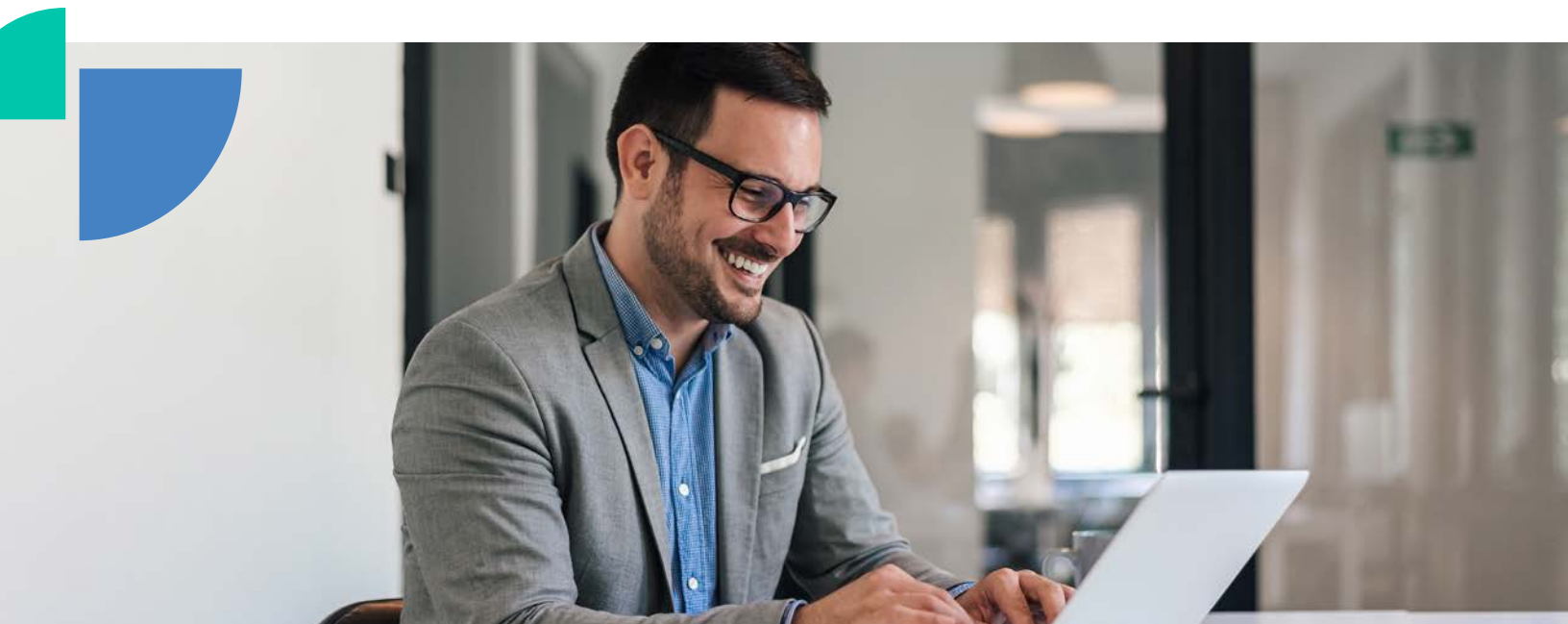
Track the real cost savings by comparing:

- Time spent processing documents
- Storage costs (physical vs. digital)
- Paper and printing expenses
- Staff productivity gains

Team and Client Satisfaction

Regular feedback helps fine-tune your processes:

- Survey staff about workflow efficiency
- Gather client input on new digital tools
- Monitor adoption rates
- Track response times and service quality



Conclusion

We started this guide by acknowledging a simple truth: going completely paperless isn't realistic for most accounting firms. But that doesn't mean you can't modernize your practice in ways that make sense for your team and your clients.

The digital-first approach we've explored isn't about forcing change or turning away paper-loving clients. It's about finding that sweet spot where technology makes your life easier without creating unnecessary friction. It's about building a practice that's ready for the future while still serving the needs of today.

Remember, success doesn't happen overnight. Start with the basics:

- Choose the right tools for your specific needs
- Create clear, consistent processes
- Bring your team along on the journey
- Keep client preferences in mind
- Measure what matters to your practice

Most importantly, remember that this isn't a race to eliminate paper – it's about creating a more efficient, flexible practice that works for everyone. By taking a practical, balanced approach to modernization, you're positioning your firm for long-term success in an evolving industry.

Ready to get started?

→ [Learn more about the SmartVault-ScanSnap integration.](#)



Bonus: Don't forget to check out our implementation checklist on the following page.

Checklist

Here's a comprehensive Digital-First Implementation Roadmap for accounting firms:

Phase 1: Assessment & Planning

- Audit current paper and digital workflows
- Document client preferences and technology comfort levels
- Inventory existing technology stack and tools
- Assess staff capabilities and potential training needs
- Define specific goals and success metrics
- Create budget for necessary technology investments
- Establish timeline for implementation phases

Phase 2: Infrastructure Setup

- Select and implement document management system (e.g., SmartVault)
- Set up scanning station and equipment (e.g., ScanSnap)
- Create standardized folder structure and naming conventions
- Establish document retention and destruction policies
- Configure security settings and access controls
- Test integrations with existing software
- Create backup and disaster recovery procedures

Phase 3: Process Development

Design standardized workflows for:

- Document intake and scanning
- File organization and storage
- Client communication and document sharing
- Quality control checkpoints
- Document retention and destruction
- Create process documentation
- Develop staff training materials
- Establish metrics tracking system

Phase 4: Staff Training

- Conduct initial training sessions
- Provide hands-on practice with new systems
- Create reference guides and troubleshooting documents
- Assign digital champions to support implementation
- Set up feedback mechanisms for staff
- Schedule follow-up training sessions

Phase 5: Client Communication (Ongoing)

- Develop client communication strategy
- Create educational materials about new processes
- Set up client portal accounts
- Provide client training resources
- Document client preferences
- Establish feedback collection system

Phase 6: Pilot Program

- Select pilot group of clients and staff
- Implement new processes with pilot group
- Collect and analyze feedback
- Identify and resolve issues
- Document lessons learned
- Adjust processes as needed

Phase 7: Full Implementation

- Roll out to remaining staff and clients
- Monitor adoption and compliance
- Track success metrics
- Address issues as they arise
- Regular check-ins with team leads
- Document best practices

Phase 8: Optimization (Ongoing)

- Regular process reviews
- Performance metric tracking
- Staff and client satisfaction surveys
- Technology updates and maintenance
- Continuous improvement initiatives
- Regular training refreshers



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