

WOODARD™

Doing More by Doing Less

Increasing Personal & Firm Capacity



- Education
- Coaching
- Community
- Resources



Joe Woodard

- Published author McGraw Hill, *Accounting Today*, *CPA Practice Advisor*, *AccountingWEB*, *The Journal of Accountancy* and *Insightful Accountant*.
- Career Trainer to over 125,000 accounting professionals
- 2012, 2014 – 2019 – Top 100 Most Influential People by *Accounting Today*

JUSTWORKS.



Moses Balian, SPHR

- HR Consulting Manager at Justworks
- Serves customers directly as an HR Practitioner, exhibiting a mix of client services acumen and extensive knowledge in human resources and employment law
- Publishes monthly articles for Justworks' blog, where he assesses trends in human capital and the future of work

Learning Objectives

- Increasing Capacity by Maximizing Productivity
- Increasing Capacity by Removing Obstacles to Peak Performance
- Increasing Capacity through Automation
- Increasing Capacity through Creative Resourcing
- Bonus: Empty Inbox in 24 Hours

Polling Question 1

How Many Emails Are Currently
In Your Inbox?

Note: *All* Emails including emails you have
read and emails where you have replied!



Maximizing Productivity

Increasing Capacity through Enhanced Task Fulfillment

Manage Time



Manage Tasks



Change the Language

I Don't Have Enough Time

I Don't Have Enough Capacity
(or Bandwidth)

I'm Not Saying "No" Enough

I'm not Delegating Enough

I Over-Committed

I Haven't Had the Time to Get to That

I Haven't Prioritized That
(Apologetic)

I Have Been Distracted
(Apologetic)

I Called an Audible Due to
Unforeseen Circumstances
(Intentional/Proactive)

Your Time is Valuable

Your Attention is Valuable

Your Role is Valuable

Your Commitment to Worthy
Initiatives is Valuable

Your Contribution Toward
Positive Outcomes is Valuable

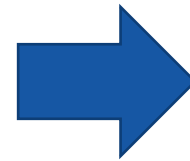
Thank You for Your Time

Thank You for Sharing Your
Point of View

Thank You for Listening

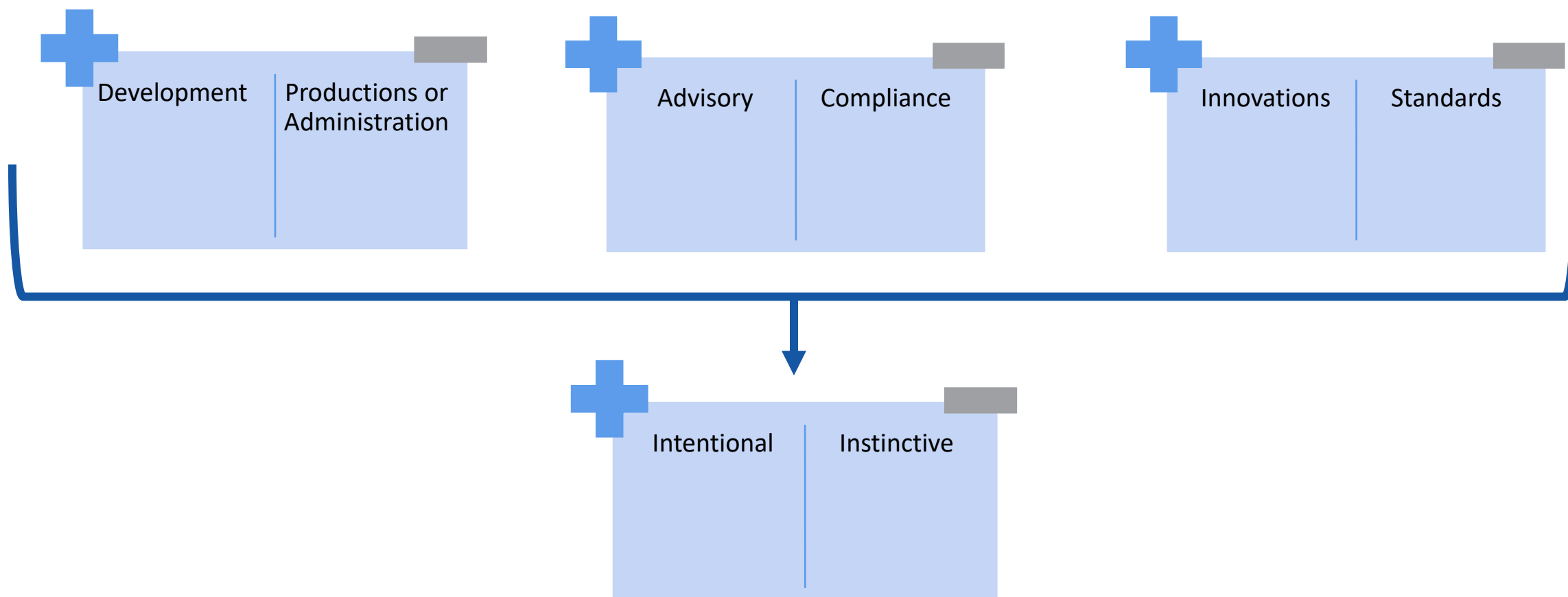
Thank You for Your Insights,
Knowledge, Advice

Manage Tasks



Manage Outcomes

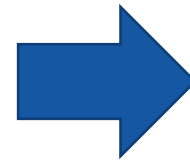
Outcome-Focused Productivity



Client-Centric Outcomes

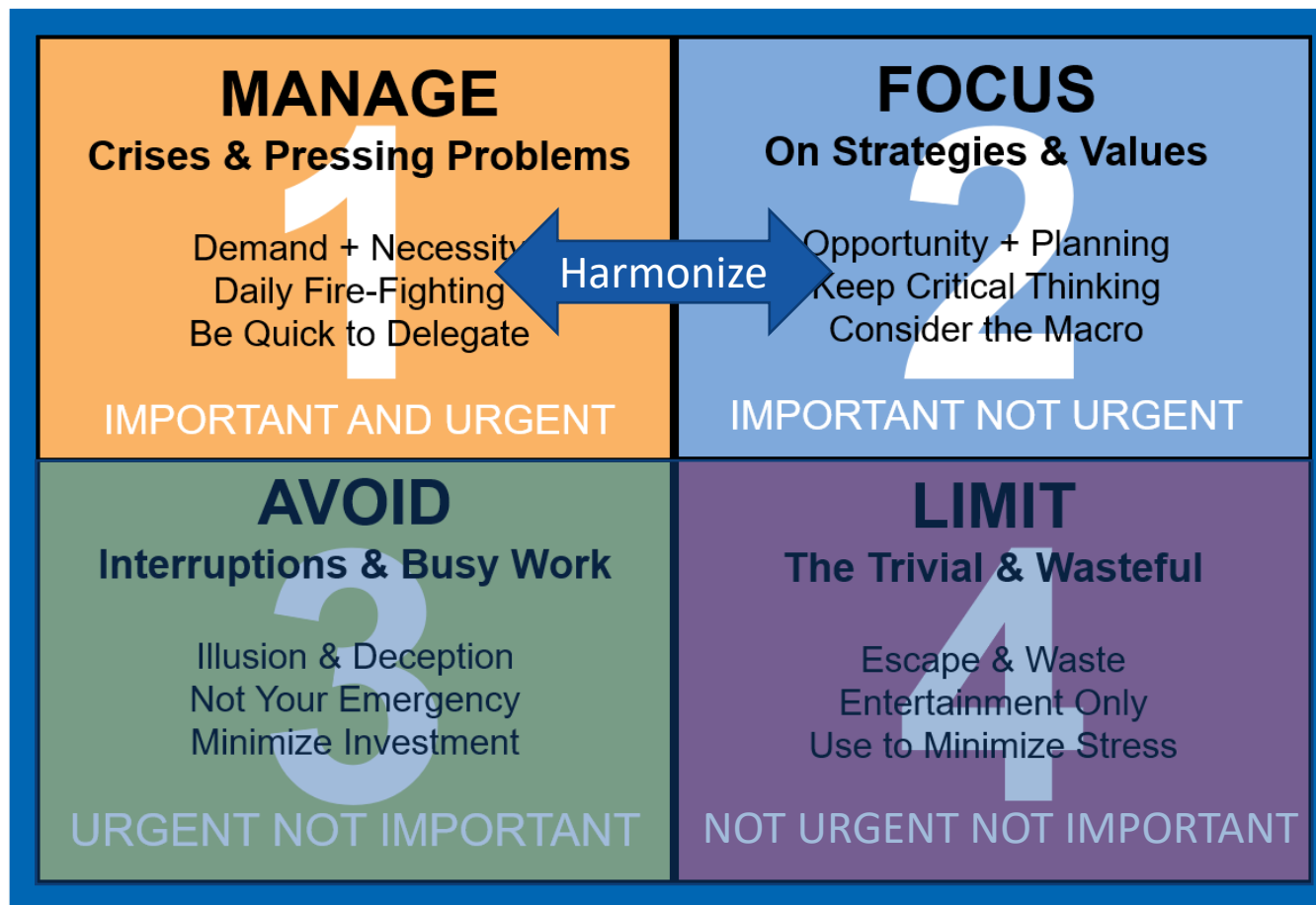
Psychological Health	Knowledge	Solutions	Process	Increased Capacity	Direction/Opportunity	Measurements (Why It Happened/What Happens Next)	Metrics (What Happened)
Automation	Standardization	Leadership	Coaching	Profits	Scalability	Peace of Mind	Hope
Work/Life Harmonization	Financial Security	A Plan	Vision/Purpose	Visibility/Clarity	Stability	Accountability	Direction

Manage Tasks

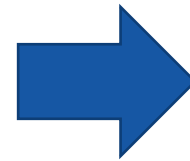


Manage Priorities

Managing Priorities



Manage Tasks



Manage Impact

Managing Impacts

My Team

My Clients

My Health

My Family

Others Who Share
My Outcomes

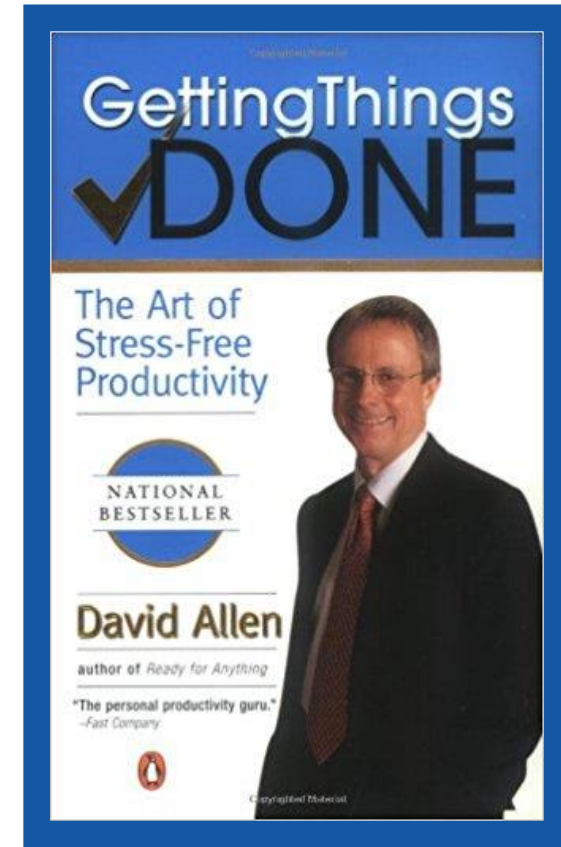
My Mental Clarity

Overcoming 5 Key Obstacles

Increasing Capacity through Increased Mobility

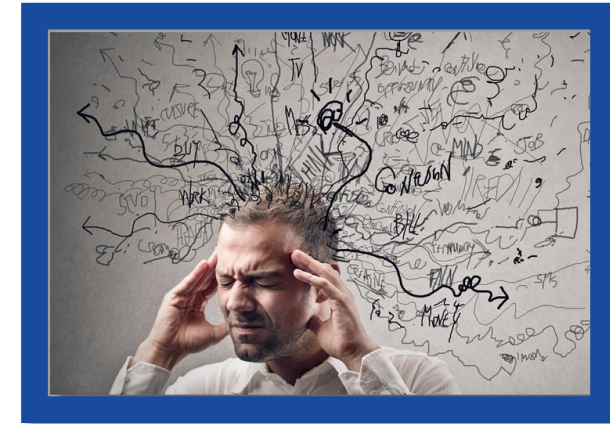
Obstacle 1: Input Overload

- **Delete it**
- **Delegate it** → “Boomerang” list
- **Do it** (including respond to it)
- **Defer it** → Send to note solution or task



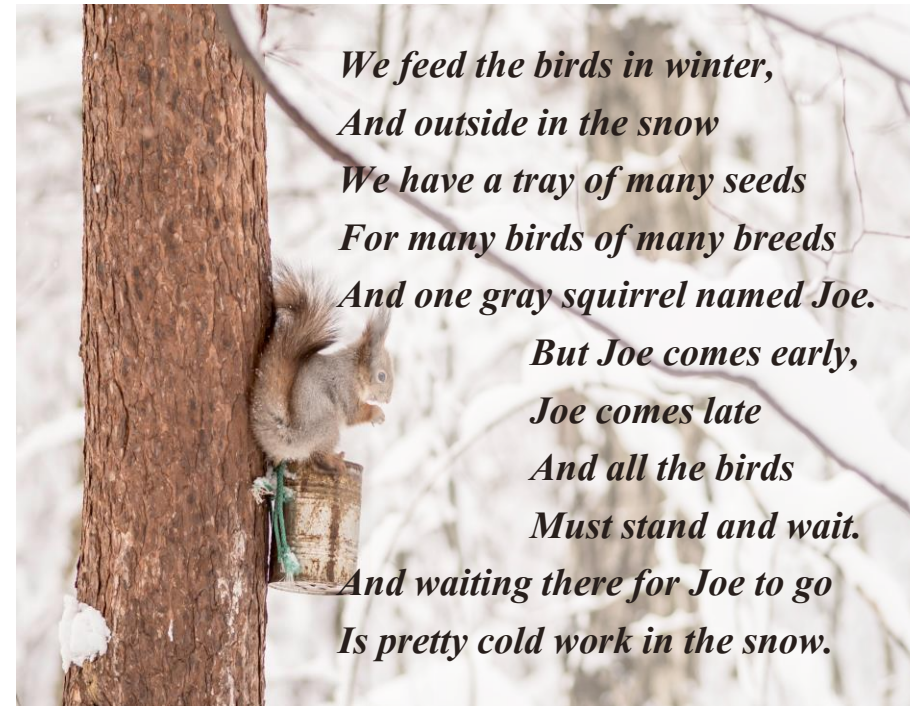
Obstacle 2: Information Overload

- **Clearing Areas**
 - White Space
 - Boomerangs
- **Holding Areas**
 - Reference
 - Event/Travel Information
- **Actionable Items**
 - Within the next 3 months? → Task system or to do list
 - More than 3 months but date specific/sensitive → Task system
 - Revisit at some future point (3, 6, 9, or 12 months) → Note solution

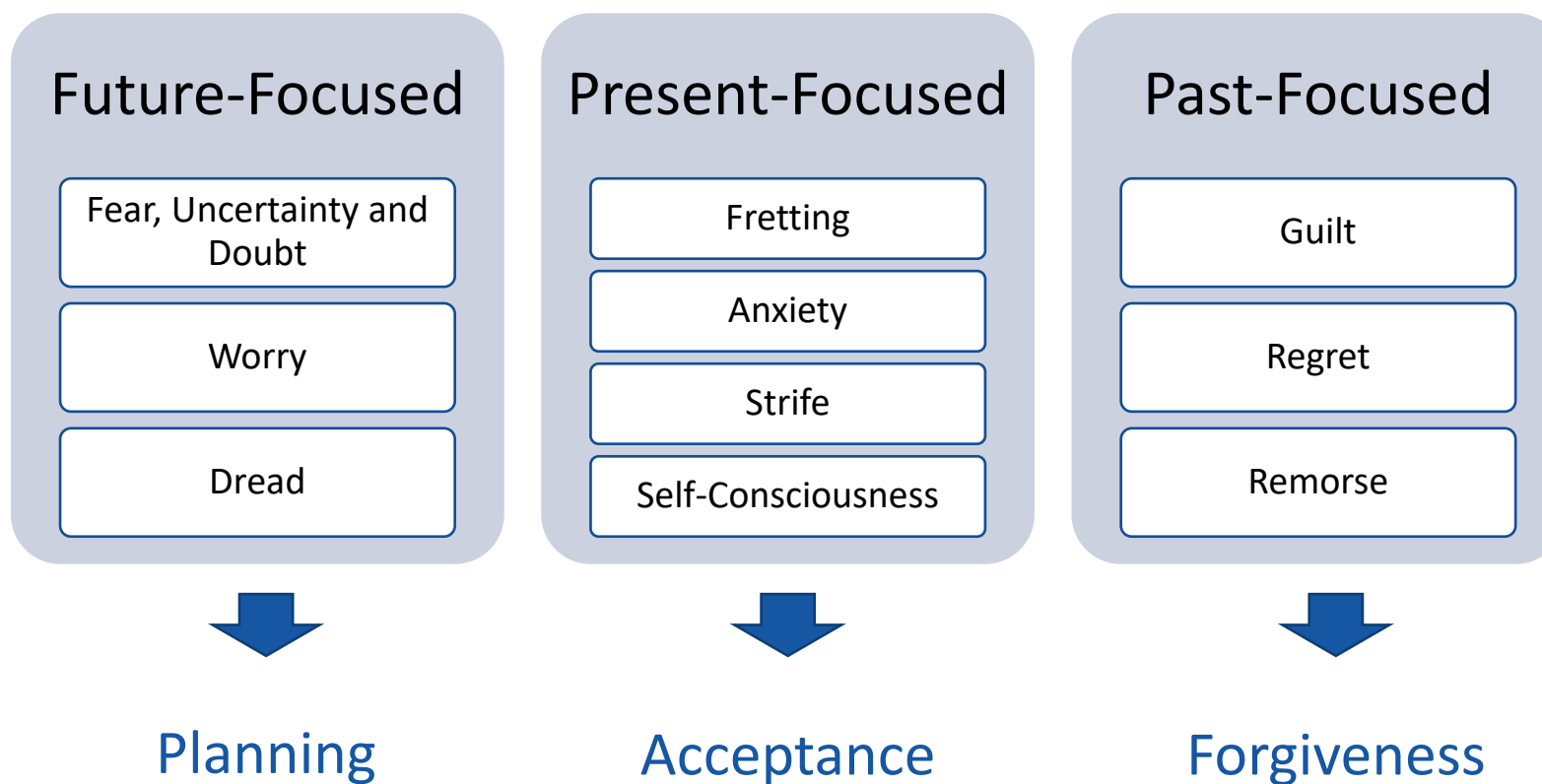


Obstacle 3: Multi-Tasking

- Distraction
- Disrespect
- Inefficiency
- Diminished effectiveness
- Decreased mental clarity



Obstacle 4: Negative Thinking



Obstacle 5: Procrastination

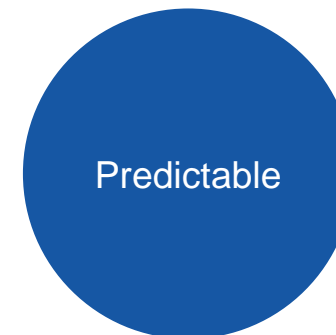
Procrastination prioritizes tasks and actions solely on the basis of:



Fun



Easy



Predictable

Reactive Solution

Urgency and panic → action through *reaction*.

Proactive Solution

Micro-Actions to Jump Start Desire

The desire to perform an action/task almost never precedes the performance of the action/task.

Automation

Increasing Capacity by Reducing Manual Workload

Automation Categories

- Third Party Fetching
- Phone Capture
- Scanners
- Scraped Email, etc.

Document Fetching, Parsing and Routing

Integrated Operational Systems

- Point of Sale
- Warehouse
- Field Services
- E-Commerce, Etc.

Financial Institutions

Integrated Process Resourcing

Automation of Bookkeeping Process

- Bank Feeds to GL
- Credit Cards to GL
- Lending Companies to/from GL

- Accounts Payable
- Accounts Receivable
- Expense Reporting
- Sales Tax, Etc.
- Time Tracking
- Payroll & HR
- 1099's

Your Practice

Suggested Prioritization for Automation

1. Feeds from Financial Institutions
2. GL-Integrated Resource for Payroll, HR and 1099 Processing
3. GL-Integrated Resource Sales Tax
4. Accounts Payable Automation
5. Data Parsing
6. Document Fetching (with Parsing)
7. E-Commerce Integration (with Full Account and Item Mapping)
8. Integration (or Mapped Imports) of Front-End Systems



Creative Resourcing

A Woodard-Vetted Payroll, HR, and 1099 Resourcing Option

Meet Justworks



BENEFITS



PAYROLL



HR TOOLS



COMPLIANCE

Why Justworks?

Outsourced HR solution for the Woodard community

Enterprise-level benefits, payroll and payments, HR support, multistate compliance

History of Success

Proven history of successful referred business

Valuable Partnership

Introductions / events

Operate in all 50 States

Justworks can work with you in any location nationally

Online Integrations

Justworks platform integrated with QBO & Xero
Client TPA access streamlines your workflow

Customer Support

Reliable customer service that is available for clients 24/7 + HR Consultancy

Value Adds from the Partnership

- Help clients save time and money with a user-friendly platform
- A dashboard to easily track and review all referrals in one place
- Having 1 point of contact at Justworks (plus access to specialists)



PEOs Make It Easier To:

- Hire employees in multiple states
- Access enterprise level benefits (and rates) for small businesses
- Maintain compliance from pay requirements to employee relations
- Consult with an HR expert on complex issues such as reasonable accommodation and employee terminations
- Ensure regulatory compliance through shared liability



Justworks Makes It Easier To:

- Pay W-4 employees and 1099s from the same system, with no transaction fees
- Complete and store paperless I-9s
- Navigate and administer leaves of absence (paid or unpaid)
- Get in touch with us 24/7



During COVID-19, Justworks Makes It Easier To:

- Schedule leave under FFCRA and automatically garner refundable tax credits in kind
- Secure PPP loan forgiveness with ease through custom reports
- Attend workshops with HR experts on navigating “return to work”



Partnership Tiers

	Bronze up to 4 customers	Silver 5-9 customers	Gold 10+ customers
Referral Bonus <small>OPTION ONE</small>			
\$100 per employee	✓		
\$150 per employee		✓	
\$200 per employee			✓
Client Perks <small>OPTION TWO</small>			
First month free	✓		
First two months free		✓	
First three months free			✓

Next Steps

For any questions, you can contact:

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Achieving and Maintaining Zero Inbox

Achieving a Zero Inbox

Step 1: Adopt a note solution.

- Store emails for future reference.
- Store emails where you need to track a response (email replies & delegated tasks).
- Store emails that you will act on later (deferred tasks).

Step 2: Remove all emails older than 60 days.

- Create a folder called “inbox through xx/xx/xxxx”.
- Transfer all emails older than 60 days into this folder.

Step 3: Group emails by sender and apply David Allen’s “Four D’s” Using Tasks and Notes (Including Boomerangs) to Organize Your Inputs

Achieving a Zero Inbox

Do's

- Consistently deploy the four “D’s”.
- Trust your note solution/tasks.
- Check your lists proactively and systematically.
- If you need a reminder, set two global daily reminders - “Check Deferred Items” and “Check Delegated Items”.



Don'ts

- Do not use task reminders (except as listed above).
- Don't get behind.
- Don't tolerate even a single email in your inbox at the end of the day.

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