INCREASING TIME, EFFICIENCY AND PRODUCTIVITY WITH HELP OF TECHNOLOGY IN AN INCREASINGLY DIGITAL WORLD-

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We Chartered Accountants are amongst the busiest professionals working in the financial industry. With a huge amount of workload what with numerous compliances, financial reporting, bookkeeping, filing taxes and various other returns and forms, and ever-increasing scope of assignments, and only 24 hours in a day, sometimes we Chartered Accountants feel like we do not have enough time to get everything done.

We constantly strive to streamline our client businesses and help them work productively. What we do for our clients, we must do for ourselves as well. Staying organized, productive, and accurate is the mantra of the day. While there may not be a magic spell to add extra hours to the day, the good news is that the right set of applications can help do wonders and boost our personal and professional productivity.

Let's list down broad areas of our lives and professional practice where various apps can help boost productivity

1. Personal Productivity

    a. Managing Screen Time

    b. Health Goal Trackers

    c. Mindful and Brain Training Activities

    d. Habit and Goal Trackers

2. Professional Productivity

    a. Managing Emails

    b. Managing Teams / Assignments

    c. Time Tracking

    d. Managing Communication with Teams and Clients

    e. Data Storage

    f. Remote Access / Collaboration Tools

    g. Other essential Applications

Productivity is personal. One can read advice from others about how they get things done, but productivity tips that work for one person might not work for you and your work style. The same goes for productivity apps. With so many different apps and tools available, it's important to identify what exactly you are looking for. May be you are an efficient note-taker, but you have a really hard time staying focused on tasks. Or perhaps you have a great system to communicate with teammates and contacts, but you don't have an effective way to schedule meetings with them.

The digital world is teeming with various applications as is apparent with the number of applications that keep coming up regularly. Sometimes we aren't even aware that a particular activity is even possible, but we have an application that helps us do it. So, while traditional ways of achieving personal or professional productivity were non digital, times are changing and digital disruption has breached the area of productivity as well. There are now applications that will help you train and improve. In the interest of covering a lot of applications, I will list down the applications along with salient features. One can have a look at the list, understand what is available and use the application that works for them the best.

1. **Personal Productivity -**

   a. **Managing Screen Time**–With increasing number of apps that are available for Iphone and Android Phones. It is very easy to find oneself unhealthily dependent on phones. One of the first things for us to improve our personal productivity is to AUDIT amount of time spent on various applications on the phone.

      Here is the list of various Time/App Trackers and analysers.

      i. **Social Fever** – Available for both Android and iOS

         The application is designed with advanced algorithms to help you manage your time wisely and connect with real life in the best way possible.

         Salient Features –

         • Get detailed info about your app usage.

         • Keep a check on your Ear & Eye health by receiving frequent reminders to have a break while listening to music & watching the screen

         • Well-designed screen tracker that ensures you use your phone for a limited duration & instead spend your valuable time embracing hobbies

         • Water reminders to stay hydrated

      ii. **Offtime**– Only iOS

      iii. **Moment App** – Only iOS

      iv. **BreakFree**– Only iOS

      v. **Flipd** – Only iOS

         • Offers a dedicated locker to hide diverting apps.

         • You can schedule reminders whenever you want no distraction.

         • Monthly challenges within the Flipd community to enhance focus & overall productivity.

         • Features to set goals for enhancing Focus, Sleep Time, Study & Work.

         • Tracks the usage time and the time you didn't use the app. Check the time which you save to motivate yourself.

         • Get reminders to Flip off to save yourself from distraction.

    vi. Famiface– Only Android

This is an app that stands out for **parental supervision** that one might want to do for their children. In addition to regular features offered by the trackers, the app offers several features such as GPS tracking, allowing a check of browser history, monitoring of apps, and several other features.

    vii. Save my Time – Only Android

    viii. Forest– Available for both Android and iOS

This unique app **motivates you to put down the screen and stay focused on your task**. The premise of Forest is simple: Plant a seed when you're ready to get to work, then set a timer. If you stick to the task, your tree grows — but if you exit the app for whatever reason, your tree dies. Soon you can grow entire forests! (Plus, the app has also partnered with Trees of the Future to plant *actual* trees, so you can help the planet while helping yourself!)

  b. Health Goal Trackers

    i. Sworkit – Available for both Android and iOS

    ii. MyFitnessPal – Available for both Android and iOS

    iii. Bon Happetee – Available for both Android and iOS

Calorie and Meal tracker which gives you inputs on Macro and Micro Nutrients. Unique thing about this App is that it contains a lot of Indian Dishes and hence is suitable for Indians.

    iv. Cult.fit – Available for both Android and iOS

This is a unique online cum offline application which has tie up with a network of gyms and fitness classes over Mumbai and other parts of the country. Online version has live trainers giving instructions for at home Workouts.

    v. Fittr– Available for both Android and iOS - Similar to Cult.Fit

  c. Mindful and Brain Training Activities – Games that train and sharpen your Left and Right brain functions and gives you a detailed analysis on which part of your brain needs more excercize.

    i. CogniFit - Brain Training, Education.

    ii. BrainHQ - Education.

    iii. Math Brain Booster Games - Education.

    iv. Peak - Brain Training, Education.

    v. NeuroNation - Brain Training. Education.

    vi. Mind Games - Brain Training. Education.

    d.   **Habit and Goal Trackers**

        i.   **Strides** – Only iOS

        ii.   **Way of Life** – Available for both Android and iOS

With this app, all you must do is pick a goal action, tell the app whether the action will be good or bad for you, and you will get a daily reminder to keep records of what you did or didn't do to meet those goals.

As time goes on, the app will be able to provide you with proper statistics that will show bar charts, chains, and trend lines that contain your progress rate.

        iii. **Goals on Track** – Only iOS

        iv. **Habitica** – Available for both Android and iOS

Habitica makes it easy to build habits and stay productive by taking an approach that rarely fails, turning everything into a game. It offers rewards to keep you incentivized, and it also comes with its own social network platform. With the app, you track and monitor your habits, use the to-do list, and join other users to play exciting games.

        v.   **Coach.me** – Available for both Android and iOS

        vi. **Atracker** – Available for both Android and iOS

        vii. **ToodleDo** – Available for both Android and iOS

Toodledo is a great time and task manager, and it provides you with features to customize it and fit all of your needs. You can rest reminders, set due dates for projects and other tasks, put tasks on repeat, and do so much.

2.   **Professional Productivity**

    a.   **Managing Emails**

As of today, emails are the life blood of our practices. Daily we deal with so many emails. From Clients, Internal Communication, Communication from various regulatory departments etc. As the quantum of emails increase, we find that a lot of time is eaten up just sorting through emails. This could be reduced by a lot with an Effective Email Management Software or tools that make our existing email management software much sharper and more efficient.

        i.   **Email Management Software's** – Alternate to Gmail and Outlook

- Help Scout
- Sane Box
- Front
- Hiver – Supports Gmail, acts as an extension to your existing Gmail account. You're able to assign emails to specific people and add notes — all things you can't do from a standard Gmail account. Paid Version.

- Moosend

- Emailigistics - Best email management software for Outlook. It is similar to Hiver, but instead of working with Gmail, it's an overlay for Outlook. It provides similar functionality and light collaboration features such as notes and assigning capabilities.

ii. **Gmail Add ons to Boost Productivity**

- Gmail as extension on various browsers like Chrome, Firefox etc

    a. Checker Plus - Chrome

    b. Mail Track - Chrome

- Gmail to Trello Integration – For users of Trello App

- Gmelius – Email Templates, Tracking, Automation, Shared Inboxes

- Right Inbox – Reminders, Scheduling, Automatic Follow-ups

- Boomerang for Gmail – Mass Email, AI assisted Email Writing

    There are a variety of add-ons for Gmail and they have been covered by me in a separate article in CVOCA journal itself. A lots of them are just a google search away.

iii. **Outlook/Microsoft 365 Add ons to Boost Productivity** - Works with Outlook 2016, 2019, and Microsoft 365.

- Grammarly - Write better emails without grammar and spelling errors. Grammarly Add on is available for Gmail and MS Office as well.

- Advanced Folders Watch - Set up alerts for specific messages in your Outlook folders.

- Text Lighting - Text Lighting is a powerful version of "Canned Responses" in Gmail. You can save the text snippets you commonly write and then reuse them in other emails.

- Evernote, Boomerang, Mr. Post Email Inspector, Custom Signatures, Dropbox, Trello, Meister Tasks, DocSend etc add-ons are available in Outlook 2016, 2019, and Microsoft 365.

b. **Managing Teams/Assignments**

i. Generic Team and Task management Apps like

- Asana

- Click Up

- Trello

- Evernote

- Monday

- Wrike

- SmartSheet

ii. **Specialized CA Practice Management Applications**– Ideally a PMS (Practice Management Software) would be a great way to digitize a whole CA office. A good PMS would contain all tools like Employee Management, Client Management, Time Tracking, Work/Assignment Tracking etc at one place. It reduces an effort to put together a system that consists of various apps. Especially when we are not technologically savvy. The license cost that we pay for these systems reaps a multi-fold dividend in form of Smoother running office.

A few PMS that are designed for a CA office are -

- Web-Edge by Webtel

- TaxAdda PMS

- CA Dashboard

- Jamku

- MyTask.co

- eProcessify

- Cordl CA Practice Management

- ERPCA

- Stack OMS

- CAProWin

- CA Office Pro

- Smart Office Management System (SDMS)

- iFirm – CCH

- Cilected ONE CA

   It is to be noted that some of the CA Practice Management Apps are given free of cost for a few years in collaboration with ICAI. These applications typically take care of all functions that are commonly seen in a CA's office. Though they vary a lot in terms of User Interface and Ease of use.

c. **Time Tracking–**As consulting professionals, it becomes imperative that we CA's track time spent on each client. This becomes a tedious task when our workforce consists of freshers, semi-permanent employees and trainees. More the number of people, difficult it becomes to keep track of Time spent on each assignment. Time Tracking Apps are a life saver in these situations. Some of most popular time tracking app's are :

i. Toggl Track

ii. Rescue Time

iii.   Tracking Time Pro

iv.   Zoho People

v.   Clockify.me

vi.   TSheets

vii.   Time Camp

viii. Harvest

d. Managing Communication with Teams and Clients

i.   **Calendly** -helps you schedule meetings without the back-and-forth emails. When you register for an account with Calendly, you'll be asked to sync your calendar and choose your availability preferences, including time slots (15 min/30 min/45 min/etc) when you're available. Then, when you need to schedule a meeting, you simply give the person your Calendly link, and they can choose the best time slot for them. No back and forth.

ii.   **Slack** – Slack has revolutionized team communication and eliminates the need for Emails and Attachments completely. If utilized properly, it could replace a CA's whole communication system. With Clients and Inhouse team. Slack provides a messaging platform that integrates with and unifies a wide range of communications services such as Twitter, Dropbox, Google Docs, Jira, GitHub, MailChimp, Trello, and Stripe.

iii.   Video Conferencing Apps like – Skype, Zoom, GoTo-Meeting, Google Meet etc

e. Remote Access Tools

We have seen perfect utility of Work from Home in last few years and if the trend is to be believed, Remote working, in some form or the other is here to stay. We CA's have learnt to embrace it. VPN is one of the tools that helps in Remote working. Following are various VPN services that are topping the lists:

i.   Perimeter 81 - This is a high-speed VPN that's easy to use with secure 256-bit encryption and 700 servers in 36 countries.

ii.   NordLayer – An expanded business VPN service that provides a software-defined perimeter service and secure access for multiple sites and cloud platforms. Per-user charging makes this a very scalable package.

iii.   GoodAccess – This provider offers cutting-edge traffic encryption and online threat protection on top of its free business VPN tier.

iv.   ExpressVPN – One of the fastest VPNs on the market with AES-256 encryption, a network lock, and over 160 VPN locations in 94 countries.

v.   Windscribe – VPN with AES-256 encryption, servers in over 63 countries, and team accounts.

vi.   VyprVPN – Secure VPN for remote access with business packages, a web-based GUI, and Chameleon technology that can prevent VPN blocking.

vii. Surfshark – VPN with over 3,240 servers in 65 countries with AES-256-bit encryption and a kill switch feature.

f. **Other essential Applications**

i. **E-Signature Apps**

- **DocuSign**

- **HelloSign**- USP - integration with cloud storage

- **Preview**– Apple iOS

- **Adobe Acrobat Reader**

- **eSignatures.io**- USP - Pay-as-you-go option

- **SignWell**- free eSign app

- **PandaDoc**- USP -Collects payments when people sign

- **signNow** for small teams

ii. **Password Managers**– We all know the perils of Cyber Frauds and importance of Passwords. A CA is keeper of lots of passwords, especially of clients. We are not new to Password managers as well. Here below is the list of Latest and innovative password managers. Most of these have free versions as well but it is most recommended to use a paid version. The maximum license fee for the best of Password managers is about $36 a year. It's roughly around 2800 a year. I'd say it's not a bad deal if we consider the value of what's at stake.

- 1Password

- Bitwarden

- Dashlane

- KeePassXC

- NordPass

- Roboform

- Enpass

- LastPass

iii. **Automating Tasks**

- IFTTT (If This Then That) is an automation tool that seamlessly connects different apps and experiences. You can set up a range of different automations in IFTTT, from everyday tasks to more niche occurrences.

  For example, you can have Google add a reminder to your calendar if India reaches Semi-Final of World Cup or set a reminder to Avoid Traffic on a particular road if it rains.

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