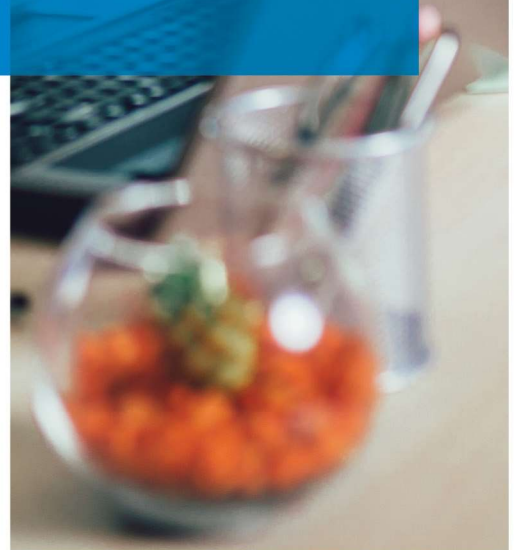




Professional
and Client
Services

Tax & Accounting

Champions Team



Purpose of a Champions Team

The firm established the Champions Team (CT) to lead the implementation of CCH software and the transition to the new environment. After the initial implementation, the CT's role is to ensure proper training for employees, maintain the firm's Best Practices document, and stay current on new standards and software enhancements. The CT will conduct regular evaluations of established processes to accomplish this goal.

The firm should designate one person as the project's "sponsor." The sponsor is typically a manager or partner who is responsible for the project in every way, ensuring goals are met, and leading all CT meetings. The sponsor should be committed to using the new software and should champion the project throughout the firm.

Change management is defined as a structured approach to transitioning individuals, teams, and organizations from a current state to a desired future state. It is a key aspect of all implementations; the sponsor should promote this change as a positive solution meant to benefit the entire organization.

CT Development Guidelines

Members of the CT should be selected so that every major service area within the firm is represented in best practices discussions. The optimal size of the CT will ultimately depend on the size of the firm (see guidelines in the table below).

CT Size Guidelines	
Number of Total Staff Members	Number of CT Representatives (Maximum Suggested #)
≤ 10 Staff Members	2
11 – 25 Staff Members	4
26 – 50 Staff Members	5
51 – 100 Staff Members	6
> 100	8

For firms with various groups/departments (e.g., tax, accounting services, audit, etc.), we recommend all groups are represented on the CT or that a designated representative from each department attends the scheduled CT meetings. Even if not all firm departments implement simultaneously, they need to be aware of changes to their workflow as a result of implementing the new software. All departments should have the opportunity to contribute to the implementation process and the building of best practices and policies and procedures. Failure to include various groups could have a negative impact on the overall implementation.

CT Roles

Based on their respective positions in the firm, members of the CT are expected to contribute in the following ways:

1. **Partners** - Partners provide support for the new software and environment. Partners outside of the CT are also responsible for communicating the firm's commitment to the new software. This commitment is communicated to employees, as well as clients. Absolute support and commitment from top leadership is crucial for a successful implementation and ongoing use.

2. **Managers** – Managers must have a good understanding of the firm’s current workflow and processes. They provide guidance to other firm personnel on policies and procedures necessary in the new environment.
3. **Staff/Seniors** – Staff and senior associates on the CT demonstrate strong accounting and computer skills, as well as a commitment to teamwork. They understand policies and procedures that affect their jobs and often offer a fresh perspective on those processes.
4. **IT Representative** – The involvement of the IT department is crucial to the installation, support, and development of firm procedures for the new software. They also assist in addressing any hardware or software issues. Going forward, the IT department coordinates software and hardware upgrades necessary to get the most out of the new software. The IT department is not primarily responsible for a successful implementation. This is the role of the partners, managers, seniors, staff, and administrators on the CT.
5. **Administrators** – Administrators must understand how their processes are affected and offer suggestions for how the new software can improve or streamline their processes. Administrative or support staff often provide a very accurate description of how things get done in the daily operations of the firm.

CT Members

The CT members should change and evolve as roles and responsibilities change in the firm. If a member leaves the firm, that member should be replaced with someone equally capable of taking on the role. Current CT members are:

Champions Team	
Name	Department/Responsibilities

CT Meetings

The CT will meet regularly during the first few months of implementation. These meetings will be held no less than twice a month to discuss any modifications to the adopted policies and procedures, evaluate the processes created, and address any issues that arise during implementation. After the initial implementation period, the CT will meet once a month. Going forward, the purpose of the meetings will be to discuss possible additions, deletions, and modifications to the firm’s policies, and to evaluate whether best practices are being followed. The CT’s meeting schedule is as follows:

CT Meeting Schedule	
Meeting Date	Meeting Time