



APRIL 2020
VOL. 52-A PART 1
PAGES 116
PRICE: ₹100

BCAJ

THE BOMBAY CHARTERED ACCOUNTANT JOURNAL

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SELF-QUARANTINE YOUR MIND WHILST 'WORKING FROM HOME'

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Uncertain times call for decisive actions, and decisions need to be taken at a much quicker pace than one would do in the normal course. Both data points and market news point to a catastrophe with the coronavirus (COVID-19) outbreak; there are public health challenges confronting the leaderships of several countries and nearly all businesses at large. As leaders of professional service firms, how we respond to the challenges will largely drive our respective firms' growth and positioning in the market and ensure that our teams and the communities around us remain safe and healthy. As part of a functioning society, the question to ask is: have we done our bit as a responsible firm and as a responsible professional?

Increasingly, either by safety concerns or by regulatory enforcement, most firms have already grounded their teams to a partial or a complete work from home (WFH) mode, or are in the process of doing so. By definition, WFH means that one needs to be working from one's confines and not be 'surrounded' by people. This also means that teams will need to be **effective** in their pursuits whilst working from home. Can we therefore practice quarantine in its truest form, i.e., meditation, which is nothing but quarantine of the mind, and to think better? Aligning one's mindset to WFH needs practice and some good refreshing ideas.

TECHNOLOGY

Here are some thoughts on increasing effectiveness during these WFH times.

Imagine a situation where you are not allowed to access your office servers or data files for a prolonged period of time.

- (i) How will you conduct your professional engagements?
- (ii) How will you discharge your tax and regulatory compliance obligations?
- (iii) How will you ensure data protection and exchange of client information without running the risk of privacy breach, or confidentiality invasions?

Using cloud technology has never been more needed than in today's times.

Experts have long argued for cloud-based systems to address efficiencies that help in remote working and active collaboration. Hosting your data on the cloud and having virtual desktops seems to be the right way to think. A lot of products are available in the market for cloud servers, right from IBM to Alibaba Cloud and a host of local service providers.

Collaboration and conferencing tools such as Zoom, Google Meet, Skype and Microsoft Teams and many others allow teams sitting remotely to interact with each other on a real-time basis, without having the need to meet physically.

Technology is all-pervasive and, during such times when we have no choice, the adversities bring out solutions that help firms to adapt and align their practices to be benchmarked to global standards. It may need a change in mindset and a commitment to unlearn and relearn, but in the end it is all worth the while. Imagine, if everything you can do in your physical office is now available in the comfort of your homes and your teams don't have to commute or travel for getting their work done, the additional productivity would mean that so much more work can be accomplished.

Traditional VPN-based models may also be effective with static IPs. There could be challenges of too many people trying to access the network at the same time and resultant delays and output. For this, Microsoft Office 365 itself provides a host of applications.

ROBUST PROCESSES

Of course, you may explore any technology that works for the firm. Being smart about it and investing the right mind space and resources in technology usage will yield good dividends for the practice in times to come, much beyond the WFH period.

When a firm is adopting WFH, one of the key elements to a successful strategy is to ensure that it has robust processes in place for exchange of information, planning for an engagement, conduct of fieldwork, review of work performed by the team members and final delivery of an engagement. Processes should include the following:

(a) Planning for remote working, rules and to-do's: HR teams should send out early notifications of what teams should do whilst a WFH is in place;

(b) The fieldwork stage of engagements during WFH would mean that you are not monitored at every step, nor can you expect to reach out for assistance 'on call'. You will have to brace for individual efforts much more than what you are normally accustomed to in a team environment. This calls for processes for increasing individual performance such as:

- (1) Planning the day for specific and achievable goals and targets whilst having to WFH;
- (2) Prioritisation of what comes first and focusing on the task at hand;
- (3) Organising conference calls with the team lead / manager to ensure that you have a sign-off on the work you are performing;
- (4) Challenging your abilities to work individually by extensive reading and applying your knowledge to a given client solution;
- (5) Writing down areas of the work product that need a review during the collaborative phase of the day;
- (6) Scheduling those reviews such that the time spent is optimised without impairing the manager's schedule for his / her own tasks of the day.

DATA PRIVACY AND CONFIDENTIALITY

Quite often, firms have got into trouble for breach of data, data leakages, confidentiality breaches and similar violations, mostly inadvertently and something that is discovered much later in the day. Clients have strict clauses and firms have an obligation to protect client data as much as the firm's own data.

How do you do it? The first step is to sensitise team members to your data privacy and your confidentiality policies. These would have pre-existed the current catastrophe in most firms. For firms where these policies were not well articulated, now is the time to do it.

The next step is to ensure that these policies are implemented. Get the best minds in the firm to work on these. Give them the tools they need to achieve 100% compliance to standards such as GDPR. Encourage them to benchmark best practices from the market. Get outside technical help as and when necessary.

Clients don't like any of their stuff to be discussed or leaked outside. They will sue for breaches. They will fire your firm if it is found guilty of violation. You may end

up losing an account if motives are ascribed. This has happened in a public company in India in 2019. There are many past instances of data breaches.

And finally, ensure that these actions are monitored and a monthly review is undertaken to make course corrections when needed. There are current standards in place and there will be stricter norms prescribed; the firms need to take this very seriously.

TEAM ALIGNMENT

Getting your teams ready and with a mindset to work from home is all about alignment. Just like when you are forced to sit at home to prepare for an event or to run an errand, when professionals have to sit at home and think about delivery of work, there could be an initial mental block. That's where the mindset to be effective has to be upper-most. There will be challenges and this is when the firm's leaders, HR teams and technology champions all have to collaborate and communicate constantly, to reassure the teams to be in alignment at all times. A help-desk should be established to mentor and guide the team members with answers to their questions. When team members know who to turn to for help, half the crisis is solved.

It is the firm's leadership's job to set the tone on alignment during WFH. It is the manager's job to monitor execution. It is the team member's job to ensure that he gives his all to be in alignment for achieving effective results.

REFLECT ON PAST LEARNINGS

Reflect on past learnings, on what lies ahead and channelize available time into research.

(A) What lies ahead:

- (i) Firms will need to reorient their processes;
- (ii) Setting billing goals, with billable hours for advisory engagements;
- (iii) Setting goals on completing specific audit areas for the day, along with conducting audit steps / audit procedures as needed;
- (iv) Tax teams will need to think about aspects of their engagements that will need discussions and use online databases to good effect;
- (v) Firms will need to communicate with clients to expect disruptions in delivery and to convey the firm's preparedness;
- (vi) How will the firm want to appear before its clients?
- (vii) How can you increase your effectiveness in such a situation?

(B) Past learnings:

We have all had our fair share of experiences with managing crises, managing turbulent times, managing stressful clients, facing challenging times and so on. Can we put that to good effect when we are designing our WFH days?

- (a) What does the market want?
- (b) What does the client expect?
- (c) Is the firm equipped to service the client?
- (d) What needs to change?
- (e) What will I do to make a difference?
- (f) What will my partners need to do to achieve the results we seek?

(C) Research:

Can we **self-quarantine our mind** whilst at home and focus on some interesting ideas, such as completing projects that were long conceived but could not be finished:

- (I) That new product or new service offering?
- (II) Video podcasts of strategic insights for clients?
- (III) Evolving latest thinking and converting it into frameworks?
- (IV) That thought leadership article?
- (V) That white paper on latest developments in your area of expertise (*Vivad se Vishwas*, *GST interpretations*, *MLI*, etc.)?

But above all we must remember at all times to stay safe, to stay healthy and to stay effective. ■