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The word innovation is bandied around quite a bit these days. Most often, it seems the word is used with personal entertainment technologies such as the latest music, camera and video functions for mobile phones, or even YouTube political debates. Unfortunately, truly useful innovations for the professional work environment are less common.

Those who know me occasionally accuse me of being a curmudgeon at times when it comes to technological advances, but this isn't quite true. I embrace some advances wholeheartedly, but I admit that I am often cynical about the promise of some new gadget or program feature when it is touted as revolutionary or ultra-innovative. Frequently, these new features are just the latest in the trend to make everything do everything possible, regardless of whether many professionals will actually need the function. This can result in bloated programs that grow, over time, to be evermore complex because of the need to make these thousands of capabilities accessible via toolbars and various menus.

I like to think that I am cautiously skeptical — I want to see how something will fit into an existing workflow or, if it requires changing the processes, how much pain it will cause during this transition. If the effort required to change is too great or too disruptive, a new technology may not be accepted, regardless of the promise it holds. Whether or not it is fair, I suppose that I am including feasibility and likelihood of adaptation into my assessment of new technologies.

Many new technologies are brought to market each year, even within our specific

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keeping up with changing needs.

An example of the former is CPA Service Group, a company that recently debuted an automated, web-based disclosure compliance system called DRM. The company is run by a CPA who specialized in these processes for the early part of his career and recognized the need for a simple program that automatically generates engagement letters, disclosure checklists, financial statements and other documents based on the AICPA's requirements. DRM provides small and mid-sized firms a more cost-effective way to produce consistent and accurate disclosure reporting that can be customized to the firm's internal standards, formats and practices.

A good example of a new technology vendor that has taken the time to learn the needs of the profession is CharacTell, whose FormCliQ program streamlines the entry of data from invoices, sales orders, estimates and other client-generated documents into an accounting system. Once a document type is scanned the first time, the system remembers where the data is supposed to be routed and does it automatically for future documents of the same type, leaving only the need to quickly review the information. It also uses optical character recognition (OCR) to automatically index and archive these documents, which makes it easy to search by any of the data contained within the documents: vendor, part number, invoice number, quantity, etc. With these documents basically one click away, they can also very easily be printed or electronically sent to recipients.

As for larger vendors serving the profession, Thomson Tax & Accounting, CCH and Intuit have invested considerable time and money into knowing practitioners and understanding how they use their products.

Thomson Tax & Accounting, which produces the CS suite of accounting, tax and practice management systems (as well as other professional systems under

other names), retains tax and accounting professionals on its staff, is heavily

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#### the Web

- [CPA Service Group](#) *The CPA Technology Advisor's Productivity Survey*  
[www.CPATechAdvisor.com/productivity](http://www.CPATechAdvisor.com/productivity)
- [FormCliQ](#) *The CPA Tech Advisor's Document Management Product Selector*  
[www.CPATechAdvisor.com/dms-survey](http://www.CPATechAdvisor.com/dms-survey)
- [Thomson Tax & Accounting](#)
- [CCH, a Wolters Kluwer business](#)
- [Intuit](#)

CCH, a Wolters Kluwer business has embraced innovation by identifying valuable new solutions brought to the market by smaller developers, acquiring them and then integrating them into its ProSystem fx product line.

Intuit, with its QuickBooks, Lacerte and ProSeries products, performs thousands of in-office visits each year with professionals to see how they actually use the systems and to see the workflow processes that are involved in client service. They also maintain a community of professional users who receive additional product-specific training.

True innovation, that which produces more efficient and productive workflow processes, isn't extinct, but it is often necessary to get beyond the marketing hype and buzzwords to see how a new technology will affect a professional.

In addition to the companies I've mentioned here, a handful of others bring products and services to market each year that hold the promise of true innovation.

We will be honoring the most notable of these new technologies with the 2008

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as giving you tools like the Productivity Survey to help you assess your use of technology, and the DMS Product Selector Tool to help you find the right document management system to meet your firm's needs. And we'll continue to evolve here at the intersection of technology and public accounting along with the profession. After all, those who do not innovate, deteriorate.

See, I'm not really a technology curmudgeon; I just try to be selective in my use of the word innovation.

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