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From the Dec. 2008 Issue

While Malcolm X was neither an accountant nor a technologist, he most certainly did understand, as demonstrated by the title quote, the relationship between today and tomorrow. So often, we (note that I reluctantly include myself in this “we”) think of the future as far off and completely unrelated to the effects of today’s planning. How wrong we are when we adopt that philosophy.

AICPA President & CEO Barry Melancon first sounded a klaxon call regarding the huge proportion of our profession becoming eligible to retire soon. In 2005, he announced that “75 percent of the CPAs in America will retire or be eligible to retire in the next 15 years.” CEO of Wolters Kluwer Tax and Accounting Kevin Robert used this statistic as a central theme in his keynote at the first CCH User Conference later that fall. But Robert not only “talked the talk,” he and his company have been “walking the walk” regarding generational changes, technology, firm growth and future planning ever since.

I recently attended the 4th Annual CCH User Conference and was again very, very impressed. The 2008 version was just like the first three ... except bigger and better and even more laser-focused on the practice of public accounting in the world of tomorrow. This year’s conference featured best-selling author Jason Jennings (“Think Big, Act Small”) and Australian wunderkid Peter Sheahan, an international expert in workforce trends and generational change. Both were super-charged speakers and both were enthusiastically received by the 1,000+ attendees. But the real story isn’t the outside speakers

— anybody can write a check and bring in great talent. Rather, the real

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natives” and “digital immigrants” and their thought processes involving photography.

“Does ANYONE print every photo they take?” he asked. “Does ANYONE print and then mail photos?” When the crowd answered, “NO,” he used the occasion as a “teaching moment” and compared those photos with an accounting professional’s workpaper. “Does ANYONE print every workpaper they prepare?” he challenged ... much to the delight of the more technologically advanced in the crowd. Sabbatis’ remarks also included references to the [MMORPG](#) (look it up!) game [World of Warcraft](#).

In addition to “getting it” relative to the role of computer connectivity, digital communications, generational style differences and social networking, Sabbatis and Robert obviously “get it” regarding what they need to do at a service and software level. Tomorrow’s firms will demand much more than today’s, and our vendors better have it tested and ready. We’ll want complete platform independence, anywhere and anytime access to ALL our data and ALL our programs. We’ll want complete integration and coordination of research and compliance. We’ll want to research with tools we already understand, like Google. We’ll want our vendors to allow us to manipulate OUR data in Word, Excel and Outlook rather than with some arcane, proprietary tool. And we’ll want smart workflow and exception reporting. We’ll need fool-proof methods for administering hundreds and even thousands of client portals automatically. And we’ll demand that vendors provide fast and accurate tax document automation. That means scan, organize, populate and develop appropriate workpapers for us. Finally (well, not exactly “finally” because there WILL be more — there’s ALWAYS more), we’ll want

our document management to extended toward knowledge management so we

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During the podcast, his enthusiasm for mentoring was obvious as well as his understanding of both the issues and the opportunities of working with Generation Y. While born squarely in the middle of the Baby Boomer generation and thus a “digital immigrant,” this guy has a passion to understand the “digital natives” of Generation Y. He claims mentor-mentee relationships with “three or four” Gen Y-ers. Listen to this podcast at www.CPATechAdvisor.com/cchuc08.

CCH employs a development design methodology they call “contextual design.” Contextual design is an iterative process with a particularly strong emphasis on end-user input. I’ve been hearing them talk about this for several years, but only recently have I seen the results. Their Product Management team now consists of both product-level managers and segment-level managers. This bifurcation of responsibility ensures that the company understands not only its competition but also the differences in large, medium and small firms. I interviewed several of these product managers and segment managers and found them to be passionate in their approach. After hearing Sabbatis’ vision for the practice of the future, I began to understand not only the product and segment manager organization but also CCH’s stated strategy of “finding the best technology available and integrating it into the ProSystem *fx* suite.”

The company’s speed to market in some areas has been breathtaking — ePace became Engagement and was a best-seller in less than three years; BOCDIP became Scan and almost immediately legitimized an entirely new genre’. In talking to CCH users (admittedly, only those most committed to ProSystem *fx* seem to attend the User Conference), I discovered significant enthusiasm for this process. Their only complaint seemed to be around a perceived slowness in the development of a next-generation practice management product. After Robert

showed slide-ware of the future product, one attendee quipped to me, “If

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both their resolve and their confidence. Oh, by the way, both are on LinkedIn. And Sabbatis claims a Facebook account, but to date he has yet to accept my “friend” invitation. Hmmmmmmm. I wonder???

Technology

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