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The tax and accounting profession isn't necessarily recession-proof, but as long as the old adage about death and taxes remains a truism, there will always be a sustainable market for these professionals. And with the continuing generation gap in the field, caused by the change in educational requirements for the CPA credential 15 to 20 years ago, there are even growth options for many mid-career professionals.

Such is the case for Mike Dionne, CPA, a cofounder and partner of Dionne & Strout, P.A. (www.dionnestrout.com).

The Amherst, New Hampshire firm recently found an opportunity for growth through a merger with Andover, Massachusetts-based KDL, P.C. The combined practice will retain offices in both locations, although the new name for the firm will not be released until sometime after tax season and many of the logistical tasks related to the merger are also pending.

Since the two firms are currently using different software and technologies, the wait is a good strategic move that will allow ample time to implement new programs, train new staff and prepare for next year. Being quite tech savvy, Mike will likely lead most of these technological initiatives. The Amherst office has a staff size of six with eight workstations, all of which have multiple monitor displays. And not just dual-screen systems. Four of them, including Mike's, actually have quadruple screens set up in a two-above, two-below format, while another three workstations have triple-screen monitors. The firm earned a very impressive score of 430 on *The CPA Technology Advisor's* Productivity Survey (www.CPATechAdvisor.com/productivity).

This is the fourth tax season that he's used a quad-display, and he

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and went to [AICPA's TECH+](#) conference in Las Vegas last year to keep up on the latest innovations. The firm uses an integrated professional accounting and tax suite, including digital document

**Partner, Dionne & Strout,
P.A.
Amherst, N.H.
www.dionnestrout.com
**Productivity
Score: 430****

Mike & Liz relax in
Costa Rica

management storage and an engagement management program that he notes lets them easily manage all types of files, including scanned documents, Word files, spreadsheets, checklists, client workpapers and supporting documents.

“We've also started using Google Docs, and it's been great for collaboration. It's an example for the future and how firms will work with clients. At the end of the fourth quarter, we were able to create forecasts, budgets, projections and management reports with clients in real-time, without having to schedule office visits.” Another short-term goal Mike has is to move away from maintaining their own servers and use all of the items in a web-based environment. He plans to first implement the changes in the Amherst office, then in Andover.

Of course, technology is only a productivity tool; the real work is still using professional experience and knowledge to help solve client problems. And, of course, the biggest challenge right now is the economy. As with most public accountants, Mike has seen the effects of the ongoing recession on his clients, whether through individuals increasingly frustrated over their retirement situation, media reports of businesses folding, or a heightened anxiety over the economy in general.

He notes that, for the most part, his long-term business clients actually remain

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CPA, starting with a handful of clients after the sale of the regional firm the two had previously worked at.

As the practice matured, the needs of its clients also evolved, and they were encountering more complex tax situations, estate planning issues and valuation challenges. They occasionally referred clients out to larger practices or legal firms, but Mike knew this meant giving away valuable clients. So about a year and a half ago, the two started looking for merger opportunities that would strengthen their capabilities and also serve as a transition plan for Terry, who was ready to retire. They were attracted to the merger with KDL, P.C. because the two practices complemented each other, with each offering expertise in different areas.

As technologically adept as he is, Mike has managed to avoid at least one of the many pitfalls that modern technologies pose: He maintains a separate work life and doesn't take work home with him. Of course, aiding him in this feat is the lack of high-speed Internet at his home. The town of Amherst is less than 50 miles northwest of Boston and has cable, DSL and other broadband options, which he has long used at his office, but he lives in the town of Sharon, a village of about 300 people surrounded by conservation land in the Monadnock region of New Hampshire. The area is revered for its colonial-era farmhouses, covered bridges and natural scenery, but not for high-speed access.

Mike and his wife Liz LaRose, who runs LaRose Marketing Communications (www.larosemarketing.com), are both New Hampshire natives who take advantage of their technological seclusion

by getting outdoors to hike and golf, and ski as frequently as they can with season passes for Mount Snow in nearby Vermont. Mike is involved with several

area organizations, including the Sou-hegan Valley and Merrimack Chambers of

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was one of the coolest trips we've been on because it wasn't a place with gaudy resorts and golf courses. We stayed in a low-key fishing village in a bungalow 200 yards from the ocean and spent the whole week biking around, going to the beach, hiking and seeing the area.”

With the merger discussions underway at the time, he wasn't able to completely unplug from technology because he had to keep some contact with the outside world. Fortunately, the town had a small Internet café where he and Liz could check in on their businesses.

Firm Management • Technology

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