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Darren Root • Dec. 01, 2009



From the December 2009 Issue

For 2010, it's all about strategy — implementing the right technologies and workflows to achieve the efficiency gains required to operate a successful firm. The technology exists all around us, and if you haven't been paying close attention, then you're missing out on some great new stuff.

I took over as Executive Editor almost a year ago, and what fun I've had meeting with software vendors, speaking at conferences, and learning about all

the incredible new solutions that are being developed. Even better, I've

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concepts, or learn the latest ideas around document management, you should subscribe

to the free downloads and join us each month. Did I mention **all the webcasts are FREE, and they offer FREE CPE?**

As I look back at 2009, I see the following topics as priorities that all firms should consider in order to move forward:

- **Portals** — This technology is getting better and more cost-effective every day.
- **Hosted Solutions** — Read my [feature article](#) and Randy Johnston's [column](#) in this issue(both on Client Accounting Online) to learn more about the value of hosted solutions – and don't miss our webcast on this topic in January 2010; www.CPATechAdvisor.com/webcast.
- **SaaS (Software-as-a-Service)** — More solutions are moving to this economical and convenient model.
- **Websites** — Use your website to create a big presence for your small firm (see our recent coverage of website builders at www.CPATechAdvisor.com/go/2639).

YOUR 2010 CHALLENGE...WHAT DOES IT MEAN?

I challenge small firms to get up to speed on today's most advanced solutions and begin to elevate their presence. The average size firm in the United States is comprised of about 3.4 employees, so almost all firms are considered "small." But despite size, developing a bigger presence can easily be accomplished with the Internet and the technology solutions I mentioned above. Your website is another critical element for boosting presence.

Think about it, by harnessing the power of technology, all of us can compete

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supports a true work/life balance.

2010 is going to be a great year, and I see the web and connectivity with our clients playing an ever-increasing role. I challenge you to start thinking about how to improve your firm for 2010.

For example, as you get ready for busy season, make sure that you have reviewed your tax workflows and at least considered using portals for tax return delivery. Also, have you documented and evaluated your tax workflow to identify where you can make efficiency improvements? Once into tax season, it's too late to adjust!

You've got a lot to think about, so if there's anything I can do to help guide you, please feel free to send me an email: droot@root.com.

Technology

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