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Apr. 16, 2010

*From the April/May 2010 Issue*

It's hard to believe, but another tax season is almost behind us (and will be by the time you read this). And now into April, I've completed my first year as *The CPA Technology Advisor's* (CPATA) Executive Editor. I have also completed my first strategic planning session with the CPATA team ... and what a phenomenal team we have!

French philosopher Henri Bergson once said, "To exist is to change, to change is to mature, to mature is to go on creating oneself endlessly."

I believe this is true in business, as well, and you will likely notice some changes with CPATA in the months ahead. Some of the key changes you will see relate to how we perform product reviews. First, we have created different categories. For example, this issue highlights our annual tax compliance software review, but we realize that not all tax compliance software is created equal. Some firms require a product that only processes tax returns with less concern for the full complement of portals integration and paperless workflow. Other firms only want to look at products that integrate the more advanced technology and workflow features.

With this in mind, this year's tax compliance software review is broken into two separate sections: Advanced Workflow and Traditional Workflow. Based on your firm's needs, you can now identify the right solutions to support your firm's unique workflow process. Our new review model also supports much more stringent rating criteria, making it more difficult for products to receive a five-star rating. This doesn't mean that solutions are not as good as (or better than) they were in the past; it only means that the bar has been elevated in each class of review.

With all the changes implemented, we are looking forward to a great year at *The CPA*

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‘Thought Leadership.’ I want to focus on thought leadership and what this means to firms. Thought leadership is the key to staying on top of change and operating at maximum efficiency. To me, thought leadership means getting outside the four walls of your firm and seeking out educational opportunities that advance your understanding of technology and best practices and what they mean to your firm’s success.

The days of silo thinking are long gone. Firms can no longer operate autonomously. We need each other. This means we need to be attending community-based forums, conferences, webcasts, and the many other education-based opportunities available. We must also look to each other via peer-to-peer networking. Think about it. Who better to educate a practitioner than another successful practitioner?

The thought leadership concept is designed to encourage you to identify ways to engage outside of your firm, whether it is with vendors, industry thought leaders or fellow practitioners. It’s time to stop thinking of other firms as competitors, and start looking to them as resources. We can learn so much from each other!

My hope is that in 2010 you will seek out ways to get involved in community learning. Again, this means moving outside of your firm to interact and exchange knowledge with others within the profession. And be sure to use *The CPA Technology Advisor* as a resource to help identify community learning opportunities. Attend our webcasts, read our reviews, and stay apprised of all that’s going on in the profession. Thought leadership ... it’s the core solution to keeping current. Let’s make this the year to step outside our comfort zone, engage and move our firms forward.

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