CPA
Practice Advisor

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I recently returned from the Sage conference in Washington, D.C., where I spent a

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Nearly every conference I've attended over the past year or two, and more articles than I can count, have focused on the topic of the Cloud — pushing the profession toward advanced, web-based technologies. During my Next Generation Accounting Firm session, one attendee, who had been quiet the entire day, stood up and asked me a question that really made me think. He asked, "Why is it that every conference I go to and so many articles tell me that I must move my firm to the Cloud? Can you help me understand this?"

To answer his question, I took off my Executive Editor and consultant hats and put myself in his shoes. As the managing partner of my own accounting firm, I've asked myself this same question several times. As I thought more about how to answer the question, I recalled the years I spent as a student and follower of Stephen Covey's, "The Seven Habits of Highly Effective People." I recalled Habit 2: *Begin with the end in mind*, which advocates looking ahead and envisioning what you want to accomplish. For me that meant determining what I wanted my firm to become. So I answered the attendee's question with another question: "What is it you want to accomplish as a firm that you are not accomplishing now?"

This core question then led to several others: Do you want your staff to be able to access data and documents 24/7 from anywhere? Do you want your clients to have anytime-anywhere access to their information via secure, convenient portals? Do you want to heighten data security by eliminating document exchange via email (and moving to portals)? Would you like to support your clients' accounting needs in real-time as opposed to working with backed up files?

I explained that in order to accomplish all these items, the Cloud was necessary — yet it doesn't have to be an "all in" situation. The Cloud may be only part of the answer. It's important to truly look at all aspects of firm operations, identify where improvements are needed and decide, ultimately, where you want to take your firm.

Once a proper analysis is done, the answer may be a change in staff, updating

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firm, as well as staying apprised of new technology developments. Keeping up with both will better position firm leaders to implement the right technologies as needed … whether that's the Cloud or not the Cloud.

Technology

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