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Jim Boomer • Jun. 26, 2012



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As our profession evolves, the role of IT professionals in tax & accounting firms is changing. More and more firms have either moved to the cloud or are preparing to make the leap. The attitude of most firms has transitioned over the last couple years from resistance to preparation for adoption of the cloud. And, this change in thinking is not coming solely from firm leadership; much of this change is being driven by IT professionals within the firms. So what impact does this have on IT professional's role within the firm?

With little to no in-house IT infrastructure to support, the IT professional's role will

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Understanding the way people work and the steps they take to get their work done should be a huge part of the IT professional's role. This understanding will be the key driver for determining the tools that will improve workflow. Gaining this understanding will require more preemptive measures than in the past. IT will be expected to be proactive rather than reacting to problems that arise and become unbearable for the end user. Sitting down, watching people work and asking the right questions will be vital.

Alignment with Training & Learning

As the IT professional becomes more of the facilitator for helping people do their job more efficiently, the connection with the Training & Learning Professional must strengthen. Interfaces will change and new tools will replace in-house technologies that have been used for years. This will require someone that understands both the processes and the new technology tools to educate the firm about the new way of getting work done. The need for someone who "gets it" when it comes to technology will become very important to developing curriculum.

A Seat at the Table

Regardless of whether firms choose to migrate to the cloud or not, technology has become so integral to a firm's success that it is critical to ensure there is alignment between firm strategy and IT. This is very difficult to achieve unless you give your CIO or Director of IT a seat at the management table. Let's look at five ways CIOs can provide a strategic advantage and why they should be contributing members of the management team.

1. CIOs bring a different perspective to the table than most partners. They see the entire enterprise and approach strategy from the viewpoint of breaking down barriers and silos.

2. CIOs understand how technology can improve efficiency and effectiveness. They

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One of the key roles of the CIO is to develop leadership and management in

developing new services and revenue streams. A quality CIO can assist you in meeting these challenges.

Critical Skills of a CIO

In the past, the IT professional's performance has been measured primarily on their technology skills. While important, to truly become a CIO and elevate to a more strategic level, sufficiency is required in other areas as well.

1. Business Savvy
2. Communication
3. Marketing & Sales
4. Human Resources
5. Project Management
6. Budgeting & Cash Flow
7. Strategy & Planning

While your IT leader might not be at an "expert" level in all areas, you need to look for potential. Do they show a willingness to learn new skills and a desire to develop beyond their current position? If the answer is yes, you likely have the right person and need to invest in development and training programs. You also need to encourage them to join a peer community and share broadly.

Technology will continue to change and the pace of that change will only increase. IT professionals can either adapt to that change and move forward, or get left behind. If they choose to adapt, they will increase their value to the firm and be rewarded with greater leadership responsibility.

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