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Darren Root • Dec. 18, 2012

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Over the years, I've worked to progressively improve efficiency within my firm. It's been more than 13 years since we started our transition to paperless, and today we are still paper free. Over the past five years, the focus has been on implementing a single client database—our goal being to create a system where client information is entered only once and is updated across applications (including smartphones).

Having tackled the single database, it's now on to the next big thing...except that "the next big thing" is already here. And that big thing is mobile. Mobile is how society runs these days. It's all about instant access to information, collaboration, and the ability to work in real time, any time, from anywhere and any device. Data is at our fingertips at every turn and we need to be taking advantage of this.

Just consider the information that we can easily obtain at any time on a day-to-day basis—hotel information, flights, maps, banking data, and so much more. We rely on this information and the ability to access it immediately...when WE need it. Our clients are no different. They want their information *right now*, too. With mobile innovations, we can now offer this level of convenience and service to clients. The question is...are you?

There are many apps available today that allow your clients to instantly link to your website and access their financial documents and data. It's up to practitioners to make clients aware of these technologies. Imagine your clients accessing their private portal from your site in one click of an app. Now that's service!

And just think about your firm in terms of mobile and the value it offers. Using

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initiative to the point that information can easily flow from your document management system to mobile devices?

I truly believe that mobile is the end game for strategies we've been developing over the past several years. Whether it's document delivery or remote access to accounting applications, the ability to access and use data when we need it, from wherever we are, and using any device is the ultimate in efficiency.

If you are not ready to go mobile, consider what you need to do to get ready. Mobile is not the next big thing...it is THE thing. It's here. Get to know it. Fast.

Technology

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