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Wife, Mommy and CEO

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**Hobbies:** Playing with my kids, decorating, drawing, cooking

**What are the key areas of your firm that have seen the greatest change in workflow over the past few years? Are you using automated workflow tools?** All of our bookkeeping clients are on QuickBooks Online and Bill.com. Those two tools help us automate a majority of our work. We continue to search for more cloud solutions that will help us or our clients be more productive. We are currently spending a lot of time developing systems to delegate work and ensure proper review by our staff.

**Have you embraced cloud computing for your practice? Are you moving your clients to the cloud?** We try to be 100% cloud when we can. We use Google Apps for our email. We use Wrike for project management. And, we continue to test and review other business apps. We are actually finding that the clients coming to us now are already in the cloud, so we don't have to worry about converting them. That being said, cloud computing isn't always the right solution for every business, so we try to help all of our clients find the solution that best fits them.

**On a broader scale, how do you see new technologies changing the accounting profession in the near term (3-5 years)?** I think more practices will start using Macs instead of Windows based machines. With so many apps in the cloud, why not? We are currently in the process of moving everyone over now.

I think we will also start moving away from just a desktop device and start using our mobile devices more often. I've heard that one day some accountants will be completing tax returns on a tablet! I think there are a ton of ways to reinvent how we do our work and how we can use these devices to allow us to better communicate with our clients.

I think new technologies will change our entire industry. With the invention of

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the MacBook Pro, I can put all these devices in my purse and connect to my work from anywhere. It is amazing!

**Have you found business success via social media, either via recognizable ROI, new customers, marketing or networking?** When I started my business four years ago, I found all of my clients through twitter. We are still using this and other social media platforms for marketing and networking. We even recently started a weekly tweet chat called QBOchat where we discuss different topics surrounding QuickBooks Online. We are currently working really hard at building strong communities and balancing our efforts on all the different platforms.

**What tips on social media do you think are essential, but perhaps missed, by professionals and small businesses?** Don't sell on social media. You shouldn't act any differently than you would in a face-to-face networking event. Don't be the guy that asks for your business card and walks away. And don't be the girl that is pushing this one service that you can't live without. Find something in common with your connections and talk about that. Grow your relationships on social media and provide valuable information. And, don't be afraid to share the silly, strange, or embarrassing. More people respond to that because they can see you are a real person.

**What single piece of technology do you find the most important in your professional life?** My iPhone – I can call clients. I can check my emails and reply. I can pull up my calendar and make new meetings on the spot. I can get directions to my next appointment and current traffic reports. I can play music to help me focus on completing a task. I can pull up files from my dropbox account. I can tweet, facebook or comment in LinkedIn groups to help my marketing efforts. I can even approve bills to be paid.

**Not including your current employer, what company do you most admire and**

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also testing out how I can use my new iPad mini in my business.

**What is your favorite accounting mobile app, and why?** Right now, my favorite app is TripLog. It tracks my mileage via the GPS and allows me to create monthly reports to get reimbursed.

**How many monitors do you have on your desktop workstation?** 2

Read more about this year's [40 Under 40 Honorees](#).

Technology

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