

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us



Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

**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?** One of the key areas that we are embracing workflow tools is in the onboard of new customers across our many product lines. Although the process for each customer is very similar, we have found that enough unique factors exist that it slowly becomes unmanageable to keep track of where things are in the process. We embrace workflow tools to ensure that our customers have the same experience and that we ensure that we are providing the best experience that we can for them. As we move our software applications forward, workflow has become a focus in that process as well. We are actively working with our customer base to begin looking at ways that we can build workflow tools directly into our software suite and how we can mostly effectively leverage those to both the corporate market as well as the CPA space.

**Have you embraced cloud computing for your practice? Are you moving your clients to the cloud?** Yes, we have. As a leading provider of software solutions to the businesses and CPA firms of all sizes, the cloud has become invaluable to us. Sales tax law is rapidly changing and often it is the smaller businesses that are at the most risk for negative impact and offering solutions in the cloud ensures that those customer receive very accurate and timely information. Wolters Kluwer has embraced the cloud in many facets of our offerings from file and document storage all the way to hosted web applications serving businesses and firms that use our software for both direct and indirect tax needs.

**On a broader scale, how do you see new technologies changing the accounting profession in the near term (3-5 years)?** Absolutely. Accountants are beginning to find themselves performing tasks on a much larger and broader scale than in the past. If you look critically at the impetus for our ability to do this, it is almost solely

related to technology. Although a more conservative profession that does not really

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

from home employee for the past 6 months, so I work remotely daily. Mobile devices have allowed me, and many others in my company, the freedom to step away from our laptops at any given moment to enjoy the freedom of working from home while still staying connected to address critical customer or business needs. Without my iPhone and my iPad, this just could not happen. It's easy to carry around a laptop, sure, but in this day and age of immediate action, even the several minutes saved by not having to wait for a PC to boot up are invaluable.

**Have you found business success via social media, either via recognizable ROI, new customers, marketing or networking?** Yes, we have. Our sales force is very actively engaged in social media via Linked In. I have seen several occasions where they have been able to connect directly with a prospect opening up another channel of communication that has led directly to deals closing. On the other side, we actively use social media to promote new product updates, professional education offerings and thought leadership. Social media allows us to instantly connect to our customers and has become a valuable tool in that process.

**What tips on social media do you think are essential, but perhaps missed, by professionals and small businesses?** Personally, I think that sometimes we take social media a little too "professionally" for lack of a better word. While our customers like updates from the companies that they do business with, I feel that they also like to know that we are real people too. Change it up every once in a while and be a little more casual. Our customers have responded very favorably to off topic let's lighten the mood posts. It encourages a different kind of exchange between vendor and customer. It keeps our media fresh and, most importantly, we find that we drive a lot more traffic just from people looking to see what we might be talking about today be it related to the services and products we provide or just a general hello to our readers.

**What single piece of technology do you find the most important in your**

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

amazed at how within such a short period of time, the company has taken top of the line products to market at a premium and has made money doing it. To me, it just goes to show that if you truly see a missed place in the market and you truly have innovation to do something about it, you almost can't fail. And yeah, paying off your government loans in only 5 years, that has something to do with it as well.

**What brand/model mobile phone do you use?** iPhone 5

**Do you use a tablet for work purposes?** Yes. iPad.

**What is your favorite accounting mobile app, and why?** I am very biased and partial to the Wolters Kluwer family of mobile apps. I can access IntelliConnect, rate look ups, forms libraries and much more all from my iPhone and iPad. As the trend of doing more onsite work for customers continues to grow, access to this information on mobile devices has proved to be an invaluable resource for myself, my co-workers and many of the CPAs that I talk to in the course of my job.

**How many monitors do you have on your desktop workstation?** 3 total. Laptop screen and 2 additional monitors connected.

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

Technology

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us