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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? In the last year we have implemented SurePrep as part of our tax preparation process. This has required us to evaluate all of our workflows and to find new best practices. We are also using the workflow tools in our Practice Management software to automate our workflow. We have set up work queues to manage both the projects and the tasks of the work we do throughout the firm.

Have you embraced cloud computing for your practice? Are you moving your clients to the cloud? Within our practice we have made a big push to deliver as much of our work products through portals to our clients as possible. Portals have proven to be a great way to provide additional value to our clients. As far as client's moving to the portal, we are finding that more and more our clients are demanding that we help them move to the cloud. We are helping them find the product that is the best fit. We are also making sure that our staff members are provided with great training on the cloud accounting options that are available so we are prepared to provide quality support.

On a broader scale, how do you see new technologies changing the accounting profession in the near term (3-5 years)? As cloud, mobile and social technologies rapidly expand and adoption rates increase I believe that we will see this cause a major shift in how we serve and interact with our clients. The need to be in an office, either our own or theirs will diminish. It will become vitally important for us to find new ways to build lasting relationships and to find ways to differentiate ourselves in the marketplace so we can create client and staff loyalty. These new technologies will also increase functionality, improve financial accuracy and provide faster and better external reporting. It will be fast paced and we need to be prepared to adapt quickly as each new disruptive technology comes at us.

How mobile are you regarding your work? How have mobile devices and apps

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Have you found business success via social media, either via recognizable ROI, new customers, marketing or networking? I am active on several social media platforms and have made several new client contacts from my participation on them. I feel my greatest success however is in the ability to strengthen relationships with clients and contacts. Through social media I am aware of events such as weddings, new babies, vacations and even when they are facing difficult situations. I am able to celebrate with them and to be more personally connected with them throughout the year. I have heard other's complain that they get too much information on social media "I don't care if my client ate steak for dinner last night" is a common type of sentiment I have heard in talking to accountants. I tend to look at it differently; if that client calls me tomorrow, how great is it if I can start the conversation with "how was that amazing steak you had last night"?

What tips on social media do you think are essential, but perhaps missed, by professionals and small businesses? Don't forget to engage with your audience. Often we retweet something and just try to make sure we post something. Make sure it is relevant, but that you also take the time to see what they are talking about. Social Media isn't just another place to advertise; the real power in social media is the ability to stay closer to your personal contacts and see what is really important to them right now.

What single piece of technology do you find the most important in your professional life? My laptop! I love all of my other gadgets and the versatility they provide; but I find that there are still things I can only do on my laptop and I find myself taking almost everywhere.

Not including your current employer, what company do you most admire and why? I greatly admire the Maryland Society of CPAs. They have gone far beyond the

traditional role of a state society and provide a valuable asset with their thought

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What is your favorite accounting mobile app, and why? While not exactly an accounting app, I LOVE Evernote, and would be lost without it, Evernote allows me to keep all of my notes about my clients, training, to-dos and to easily collaborate and share with my team in real time no matter what device I have available to me. I have even started using it with my kids to coordinate their school assignments and schedules.

How many monitors do you have on your desktop workstation? I have 3 monitors in my office; one is a large screen monitor mounted on the wall that I use to work with clients in reviewing their information and providing QuickBooks training.

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

Technology

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