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**Hobbies:** Hunting, Fishing, Snowmobiling

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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? The**

web and mobile have created new ways for firms and customers to interact. Until

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believe the connection between the firm side and the client side is the next major frontier. More and more firms are using cloud-based applications to create always-on connections with their clients. The time savings are immediate, and firms deploying cloud based systems gain a competitive advantage because they can offer business clients better service in less time, as well as the tools to make more informed business decisions.

**Have you embraced cloud computing for your practice? Are you moving your clients to the cloud?** It's my job to understand firm needs and look into the future to ensure that they have the tools they need to be more competitive, efficient, and profitable. Without a doubt, cloud based systems offer important new opportunities to firms, and we have focused an increased amount of our development resources on these systems.

The summer of 2013 will forever be called "the year of transition," as more and more firms see the need to move to the cloud. There is now greater awareness that not implementing a cloud-based system and tools puts the firm at a competitive disadvantage. While uncovering pain points for firms, we hear stories about the firm down the street that is able to provide real-time reports and faster turnaround time on deliverables. It's unfortunate that many firms see the change as a burden rather than an opportunity. But it's encouraging that even the firms that are reluctant to change are learning more about the cloud and moving past some of the fears that have held them back in the past, such as security and data ownership.

**On a broader scale, how do you see new technologies changing the accounting profession in the near term (3-5 years)?** I think that online client software and mobile are going to continue to drive change. As these platforms are developed, software vendors will apply financial data analysis tools, advanced reporting features, and additional e-commerce that will increase the value of the services they

receive from their accountants. I'm looking forward to even smarter systems that will

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balance. Fortunately, Thomson Reuters recognizes the productivity gains made possible by these devices and provides them to employees like me.

**Have you found business success via social media, either via recognizable ROI, new customers, marketing or networking?** I've seen first-hand how making our newsletters, tips and tricks, and thought leadership resources available via various social media channels helps establish us as knowledge experts and generates awareness of our product offerings. I've also seen a lot of firms successfully use the same strategy. They periodically share their accounting and tax knowledge to establish themselves as a trusted partners and advisors to their clients.

**What single piece of technology do you find the most important in your professional life?** My smart phone. The ability to access to company resources The accounting and payroll business is deadline-driven, and that means being available to put fires out, even outside normal business hours. Being responsive to the needs our customers is critical.

**Not including your current employer, what company do you most admire and why?** Reading about management turnarounds (and failures) has always fascinated me. As a rider, I admire Harley Davidson as a company that at one time was almost extinct and now is now the greatest motorcycle brand continuously ranked on the Fortune 500 list. As a product manager, I look to examples like Harley Davidson to understand how they turn risk into opportunity and re-focus strategy on their core competencies and customers. With the right leadership and investing in employees, the company has welcomed change and evolved into the company it is today. I believe most problems in business have already been experienced by others in the past, so Harley Davidson is a great case study. I can only hope that someday, all accountants will have Accounting CS software icon tattoos.

**What brand/model mobile phone do you use?** I'm current packing the Sprint

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lot of businesses who use remote workers and off-site employees, and it makes me proud to hear the stories. Payroll processors get timely and accurate time from their clients, business owners offer their employees a convenient way to report, and employees have access to information when they need it most. Win win win.

**How many monitors do you have on your desktop workstation?** I currently have 2 monitors and am pleading for another.

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

Technology

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