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Matt Patrick, CPA — 39

Managing Member, Patrick Accounting and Tax Services, PLLC

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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? Being completely in the cloud for the past three years has forced a more front-end digital process. Our clients provide almost 100% of the information we need on a monthly basis electronically. Tax information has been more challenging to acquire electronically, so we implemented Sureprep two seasons ago in order to aid in our workflow process and provide a more standardized process. We use a number of automated workflow tools such as bill.com and Practice CS to better manage the “paper” and projects within our practice.

Have you embraced cloud computing for your practice? Are you moving your clients to the cloud? We have been in the cloud since 2005 with respect to our clients and then completely moved our office to the cloud three years ago. It is without a doubt the best thing we have ever done and the efficiencies gained have been substantial. Our clients are able to receive better information from us, our staff are able to work anywhere and anytime, and we have the added security of our information being in a secured facility with real-time backups and redundant fail-safes.

On a broader scale, how do you see new technologies changing the accounting profession in the near term (3-5 years)? I believe technology is pushing our clients to want and expect information in real time and available at their fingertips. Mobile and the cloud are pushing everyone to have access to everything they want on their phones or tablets. I feel that we need to be thinking about how our clients utilize the information we provide to them and how they access it. Providing our clients' information on an app or mobile site will be critical over the next few years.

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

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overall brand awareness and allows us to communicate our firm culture. We constantly update Facebook and Twitter with firm happenings and accounting and tax information, however it is only a part of our marketing efforts. It is all intermingled and must work together to be successful. Our website, blog, newsletter, Public Relations, social media and direct networking efforts are critical to our growth.

What tips on social media do you think are essential, but perhaps missed, by professionals and small businesses? Social media is such an awesome tool to show your true colors and tell your own story. Accountants are not the caricature they are portrayed to be; social media allows us to show our interests, our families, how much fun our firms are, and how cool all of our staff are. Don't let the opportunity pass you by.

What single piece of technology do you find the most important in your professional life? My phone—I can't imagine life without it. Everything I need is at my fingertips.

Not including your current employer, what company do you most admire and why? My dad owned a nursery business with his brothers when I was growing up. They sold it in 1995, but I was always proud of the hard work and dedication they all put in everyday. I was aware of the daily stresses of owning your own business, but also the joys and flexibility it provided as they were able to attend every event my sister and I ever had. They are the ones who inspired me to own my own business one day.

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

Do you use a tablet for work purposes? I have both an iPad and a Microsoft Surface and use both for different purposes. The Surface is a great combo tablet/laptop and

One Note is a really cool program. The iPad I utilize for many a variety of tasks

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Technology

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