

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



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?** SurePrep's 1040SCAN suite of Optical Character Recognition (OCR) tools along with our electronic binder and workflow system, SPbinder, allow CPA firms the ability to reduce the time spent on organizing client source documents and manually data entering tax data into the tax return. Eliminating tasks which can be automated through the use of technology permits accountants to spend more time on value added consultative work. SurePrep leverages these same technologies within our Outsource processing service, which results in consistently higher tax return preparation quality while reducing the time spent preparing each tax return.

**Have you embraced cloud computing for your practice? Are you moving your clients to the cloud?** I am a proponent of cloud computing and our tax document automation technology and SPbinder are cloud based solutions. One of the keys to our success has been the continued development and enhancement of our solutions and services to meet the constantly changing needs of the profession, which includes leveraging the cloud as the delivery platform. On the product side, we have moved our entire infrastructure from a collocated facility to a cloud-based (IaaS) provider, which allows us to deliver our customers higher availability, agile scalability, and business continuity. We have further used cloud computing to facilitate collaboration between geographically diverse teams and offload responsibilities outside our core competencies, such as email to expert providers like Microsoft.

**On a broader scale, how do you see new technologies changing the accounting profession in the near term (3-5 years)?** Large service providers, such as Microsoft, are making significant investments into platforms such as Office 365 in an effort to change the way enterprise clients interact with productivity software. These changes are already being embraced by early adopters within the accounting profession, and the continuing growth of cloud technologies in the enterprise will bring improved

collaboration, the ability to perform work from diverse locations and reduced IT

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

**Have you found business success via social media, either via recognizable ROI, new customers, marketing or networking?** Yes, Social media is part of our overall business development plan and is utilized for sharing relevant information, creating introductions to potential clients and recruiting high performing members of our team.

**What tips on social media do you think are essential, but perhaps missed, by professionals and small businesses?** Social media provides another avenue to market your products, services and/or solutions. The content, messaging and branding included within each social media site should be consistent and relevant to your organization and industry. It's important to be engaged in social media, but ensure your utilization of social media compliments your messaging and branding.

**What single piece of technology do you find the most important in your professional life?** I have become dependent on my iPhone to stay connected to work especially when I'm traveling. My iPhone allows me to maintain constant communication with our clients, prospects and with our teams. Besides a communication tool, I utilize my iPhone to access Salesforce.com remotely, manage my calendar, coordinate my travel plans, locate restaurants and nearby attractions, GPS navigations and even to locate where I parked my car from time to time.

**Not including your current employer, what company do you most admire and why?** Although I admire the way Apple has defined the way we use technology, I'm going to go with Google. In 15 years, Google has transformed from a search engine to one of the world's most important technology companies. From Google Maps, to Android, to YouTube, to technology which we don't see every day, such as Google's commitment to alternative energy viability, Google has changed our lives and continues to bring data and information to everyone's fingertips. These examples make me wonder how Google Glass will change our everyday lives over the next 10

years? In addition to technology advances, Google is one of the most desirable places

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

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.

© 2024 Firmworks, LLC. All rights reserved