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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? I would say the key areas are project management, accounts receivable and time scheduling. Are you using automated workflow tools? YES! As much as we can, I've incorporated productivity tools like FullSlate.com, Mavenlink.com, ZenCash.com, TSheets.com. These are tools that my staff and I can use to streamline the processes we have in place, keep up with what we're all working on, and keep the business running smoothly.

Have you embraced cloud computing for your practice? Are you moving your clients to the cloud? Most definitely! I work almost exclusively remotely with clients. I [moved existing clients to the cloud about 5 years ago](#) and now any new ones that I bring on are automatically set up with QuickBooks Pro/Premier/Enterprise that is hosted with UniDataIT.com or QuickBooks Online.

On a broader scale, how do you see new technologies changing the accounting profession in the near term (3-5 years)? My mantra to colleagues for the last year or so has been "Get online or get left behind". In order to remain a viable option for new clients, new technologies must be embraced. Personally, I jump on new technology and try it out personally or within my own companies before I bring it to clients.

How mobile are you regarding your work? Almost 100%. As long as I have an internet connection, I can do about 99% of my work. The only thing I need my office PC for is what I call "heavy lifting" data conversions.

How have mobile devices and apps impacted your productivity and work-life balance? I don't think there really is such a thing as work/life balance. Because of the way it's becoming a global community and economy, work (for me at least) is never really turned off. I work from home much of the time, and I spend all day working – doing client consultations or training sessions, bookkeeping and payroll tasks, writing and developing training content – as well as living – getting laundry done,

cleaning up around the house, getting a workout in, or doing something with my

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we have thousands of weekly listeners and most archived shows have been listened to more by more than 10,000 people. Some even have over 20,000! We grew our listener base with no budget and using not much more than Facebook, LinkedIn, Twitter and Google+

What tips on social media do you think are essential, but perhaps missed, by professionals and small businesses? Avoid the non-stop “hire me hire me hire me” or “buy this buy this buy this” stuff or constant tips and tricks. Both are fine, but in small doses. Try to mix it up. Post links to funny pictures (who doesn't love a baby elephant with a giant soccer ball?), mention some personal things (some silly accessory for my mountain bike), interesting articles (such as details on the Marketplace Fairness Act) and THEN mention stuff like: “Oh hey, I'm presenting a webinar on Point of Sale in 2 weeks.”

What single piece of technology do you find the most important in your professional life? Woody Adams, one of my partners and co-hosts/co-founders of RadioFreeQB expressed it perfectly while we were traveling recently: “You only packed a carry on? *AND YOU DON'T HAVE YOUR PHONE IN YOUR HAND?* ...It's like I don't even know you.” My phone. It feels like I've lost a limb if I don't have it with me.

Not including your current employer, what company do you most admire and why? I don't have one specific company that I admire most – it's more of a type. I've been doing quite a bit of consulting work with software developers of QuickBooks Online add-ons, and I really love how they've identified a pain point and then found a way to provide the best possible solution for small business owners. They generally have an impressive team of people working for them: smart people that are passionate about providing a great customer experience. Both of these qualities make the other side of my consulting practice – the work I do with accounting

professionals and small business owners on how to move their businesses online and

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What is your favorite accounting mobile app, and why? Do I have to pick one?? If I just pick ones that I use for my accounting/bookkeeping practice... I LOVE the Intuit Payroll App, and I'm loving the dropbox interface – great for starting a document on device and finishing on any other one. Also, I love Sign N Send; I use it so often instead of printing. CloudOn is awesome too. And the QuickBooks Online for iPad. Can't forget that one!

How many monitors do you have on your desktop workstation? In my office (and to be honest, I try to spend as little time as possible down there), I have two 17" monitors. But I usually work from my 11" MacBook Air

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

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