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main issues to be alert to. Consultants may do a good job when contacted, but ...

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Recently, a panel of Chicago area IT experts addressed my small firm roundtable group. We were privileged to have with us Terry Beyersdorfer, Director of IT at ORBA, a \$20M firm and Matt Schoenfeld, who manages the IT strategy and implementation at \$11M Mowery & Schoenfeld as their Admin Partner.

Here are some gems:

Online back-up. The key: The program you use should make it easy to restore data.

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If Terry or Matt were hired by one of our firms to do an overall IT assessment, what would they focus on the most? Use of multiple monitors, backup internet connection, up-to-date equipment, off-site backup, network effectiveness and extent that servers and workstations are current.

Computers used by personnel when working remotely. ORBA gives everyone an encrypted laptop. “We don’t want people working on their home computers; not secure enough.

Use of public WiFi (Starbucks, hotels): Panelists tell their personnel never to use them due to security vulnerabilities.

Multiple monitors: Three monitors is now the norm. Once monitors get larger than 24”, there are resolution issues.

Password management: Everyone deals with having several dozen passwords for various web sites, having to remember and change them. Panelists recommend use of software to manage this digitally: Dashlane and RoboForm.

What directions, changes and innovations are on the near-term horizon? More hosted sites. Security will remain a key concern. Identity theft is on the rise

Marc Rosenberg is a nationally known consultant, author and speaker on CPA firm management, strategy and partner issues. President of his own Chicago-based consulting firm, [The Rosenberg Associates](#), he is founder of the most authoritative annual survey of mid-sized CPA firm performance statistics in the country, The Rosenberg Survey. He has consulted with hundreds of firms throughout his 20+ year consulting career. He shares his expertise regularly on [The Marc Rosenberg Blog](#).

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