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Association, Institute of Internal Auditors, and Association of Certified Fraud  
Examiners

**Civic Involvement:** Volunteers time and expertise to the open source community.

**Hobbies:** Golf (five handicapper), skiing, travel (visited over 30 countries), software and computers

**Cell phone:** An iPhone 4, and I love it! However, it seems there are an awful lot of really good smart phones available now on all of the different carriers.

**Favorite app:** Golfshot GPS on the iPhone, without a doubt. It provides comprehensive GPS yardages on the course plus tracks statistics on my golf game to help me learn what areas need the most improvement. If I had to confine the answer though to boring, work-related apps, my favorite is honestly one of our own web apps, [Workpapers.com](http://Workpapers.com). It is the perfect application to give me everything I need for effective client service but absolutely no extra clutter I don't need. I love going to work and using it on my engagements every day, and as a happier, more productive auditor I am a more effective auditor.

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**How many hours of the day are you plugged in and responsive to client needs?**  
**And what tools/products make it possible for you to have flexibility?** I am plugged in virtually every hour that I am not asleep or on an airplane. As a small CPA firm, we of course have to be very responsive to our clients. As a software company though, I love hearing from our customers and really enjoy handling many of their support requests myself so I can learn more about how they use our products. Those requests can come at all hours. The tools that make follow-up timely and possible given my full schedule and regular travel are my laptop, of course (an Intel MacBook Pro), the Verizon MiFi (for WiFi access anywhere), my iPad, a wide variety of fantastic web-



based software products (iTickmark's own products, as well as those of many other

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back when I could find almost no one I knew to link with on those services. I think those tools (in and of themselves) are dramatically overhyped as "marketing tools." I find Twitter has gotten very full of "noise" over the past two years, Facebook feels like a personal space to me (I find marketing there annoying frankly), and LinkedIn is adding too many unnecessary "features" and clutter. I think they can still be valuable for marketing but not any more so than "real world" networking tools. For small firms, effective marketing is dependent on how genuinely you care about your space, how much passion you have for your work, and how transparent you are with your customers. If you have those things, the tool or medium won't matter in the long run. Our firm has not ever sold an audit engagement to a social networking lead and frankly we don't expect to anytime soon. That said, iTickmark has both customers and vendors that came directly from social networking leads, particularly on Twitter, so I think it probably depends a lot on your business model, as well.

**What pitfalls or what unwritten rules of social networking etiquette exist, which are frequently missed by others in the profession?** On Twitter, please don't just constantly tweet links to various publications. There is no need for this, as we all know these publications anyway. Instead, have strong opinions and something to say. Those are the people who are interesting. Most importantly, though, write no more than a few tweets per day or you are just sending another form of spam. Reserve Facebook for a personal space to talk with friends. Share with them about your career, but leave the actual marketing to some other medium. I am confident most firms do not need a Facebook fan page, despite what many social media "experts" tell us lately. Spend that time brushing up on new tax law or something instead. If Facebook continues to grow into a marketing medium, as it has been doing lately, I have little doubt it will be abandoned the way MySpace was.

**NOT including your current employer, what company do you most admire and why?**

The company I admire most is Orchards ACE Hardware in Loveland, Colorado. It is

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For hundreds of millions of people around the world, there is no meaning in the story, it only happens for a select few companies. However, with passion and a dedication to the basics of execution, there could be a lot more “local hardware stores” in the software space.

**Do you use online resources like webcasts for CPE training?** I frankly hate webcasts. I find they are more often than not a waste of time where little learning is actually accomplished, yet I get so many emails about available webcasts that I had to add a filter to keep them out of my main inbox. Outside of that, though, we use many online resources. Mostly web applications. Our favorites are Google Apps, Dropbox, Xero (which is a great product more accountants that do bookkeeping should consider for their clients), [Workpapers.com](http://Workpapers.com), and a whole variety of web-based software development tools.

**What are some ways your firm/business has gone “paperless” and/or “green” in the last two years?** Our firm has gone completely paperless over the last two years. While being “green” is certainly an important side benefit, the reason we made a strong move to paperless was because it was required in order to stay effective. We needed to have all of our work available to us any time, even as we expanded our services into audits in Europe and Asia. In fact, this was much of the reason I began writing the electronic workpaper software that ultimately became iTickmark's [Workpapers.com](http://Workpapers.com) product. Our CPA firm needed a way to organize our audit procedures and documentation, make them securely available to our team around the world, and do so at a cost that was reasonable for a small firm. It turned out that we did such a good job accomplishing that, other organizations wanted to use it, as well, and [Workpapers.com](http://Workpapers.com) was born as a product available to the public.

As iTickmark has grown in the hosted software space, we keep an eye on “being green” there, as well. For our customers, using [auditconfirmations.com](http://auditconfirmations.com) (our electronic audit confirmation service) and [Workpapers.com](http://Workpapers.com) (our electronic working

paper and audit project management product) replaces traditionally paper-based

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total mystery to me why every accounting firm doesn't make extensive use of Google Apps, Dropbox, and (of course) [Workpapers.com](https://www.workpapers.com) for example. Each of these have played a huge part in evolving our firm's audit workflow to what I think is the best available in the market in our service lines.

**How is cloud computing changing the accounting profession, and how concerned are you with the security issues related to cloud computing?** It is, without a doubt, making accounting firms more profitable. Specifically, with cloud applications, we spend less time syncing or aggregating our data, less time dealing with computer and IT issues, less time backing up data, less time on the phone with vendor support, less time in status meetings, etc. In turn, we spend more time collaborating on each other's work, more time conducting actual audit procedures, more time analyzing data, etc. All of these are drivers of utilization, realization and profitability for professional services groups.

As a vendor of "cloud computing" products (and thus a steward of other companies' data), we take security incredibly seriously, as do most "cloud" application providers. We do more everyday to protect the security of customer data on our servers than any company could ever reasonably do to protect the data on their own laptops or even their internal servers (penetration tests, daily vulnerability scans, independent internal control audits, personnel training, etc.). That said, the fact remains that data leaks from every company, every day because of the day-to-day decisions made by employees. For example, there is no such thing as an enterprise firewall product that will stop the leakage that occurs when an employee emails company documents to a Yahoo! account because they are having some PC problem (unless that product is so crippling that it gets in the way of employees doing their jobs anyway, which is even worse). I really believe that we need to stop worrying about "cloud" security vs. "non-cloud" security and focus on human security, as this will have a much more

profound effect on the small security breaches that occur in all large organizations

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the physical servers will disappear very rapidly.

I think every firm should get started by outsourcing their email servers tomorrow (or faster if you have an opening in your schedule this afternoon). They are a total pain in the neck to manage, but they are very easy to outsource to any number of hosted providers. Once you outsource your email server and realize that life in the cloud is fabulous, you will wonder why any other firm is crazy enough to sit around and mess with that kind of stuff internally. When firms use our web-based applications, they will never again have to worry about applying patches, purchasing upgrades, replacing obsolete hardware, doing backups, contract renewals, dealing with pushy sales people, etc.

**Do you subscribe to a magazine and/or local newspaper?** My favorite newspaper is the *Financial Times*, and I read it on the iPad ... but I am not real big on local papers. I subscribe to a number of magazines (*CFO*, *Accounting Today*, *The CPA Technology Advisor*, etc.) and like all of them, but when they are not on the iPad, I find I rarely have them with me when I have time to read. I feel like it is important to stay informed but with all these sources, but being “too informed” is a huge problem today. Many of my colleagues spend too much time reading about work and not enough time actually doing it themselves. Pick one or two key news sources, then ignore the rest of the noise.

**What ONE piece of technology could you absolutely not live without?** My MacBook Pro laptop. I can't design software, write code or serve clients without it, and those are the things that I love doing. I could just barely slide by without my iPhone if I absolutely had to, but couldn't be in business without my MacBook.

**What operating system and version of Microsoft Office is installed on your work computer?** Mac OS X Snow Leopard and MS Office 2008 Mac Edition are my primary OS and MS Office editions. However, Office for the Mac is marginal at best, in my

opinion, especially if you are a power user of Excel, as I would say most accountants

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individual can have, both in software design and professional services).

**What is an “old school” business practice or process you’d like to see changed in the next five years and why?** In business, we do way too much planning. People may think I’m crazy, but I think plans are just guesses. Things always change (and change more rapidly all the time) so even the best guesses are often quickly rendered meaningless. Therefore, I don’t understand why everyone spends so much time planning when there is always something “real” you can be doing right now. Work on the most important and well-defined pieces right now, then the next, etc., and the project quickly begins to take the proper shape while staying agile and adaptive.

**What sports team/championship event do you absolutely refuse to miss?** Notre Dame home games, the Denver Broncos playing conference rivals (particularly the Raiders), the Final Round of the U.S. Open, and the Yankees in October

**What are some of your favorite books, movies, music, websites and TV shows?** I love books on design. Software design, architectural design and design science are exceptionally interesting. Generally speaking, TV is a huge waste of time but “Entourage” on HBO and “Weeds” on Showtime are just too good to miss.

**How many monitors do you have on your desk?** I use one large (30-inch) monitor. For many years, I had three monitors (one 30-inch and two 21-inch) on my main computer but finally figured out that having multiple monitors is actually counter-productive. It seems like a great idea at first, but it turns out to be a net distraction as I find myself wasting too much time shuffling windows between screens. I like to carefully eliminate any reasons like this to spend time planning or organizing in favor of maximizing my time spent “doing.”



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