

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



Chief Innovation Officer, Blumer & Associates, CPAs, PC

Greenville, SC

Education: BA in Accounting, with Honors, Wofford College

Professional Associations/Memberships: AICPA, SCACPA, ACFE

Civic Involvement: Assist various nonprofits free of charge, Deacon at church

Hobbies: Reading, working out, skiing, music, spending time with family

Cell phone: iPhone

Favorite app: OMG, Angry Birds, of course!

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

are exposed to the theories of process improvement and now moving their processes to the cloud could make their businesses more effective, efficient and profitable. We also have a "going green" endeavor to have our clients volunteer to go paperless with our firm. They must agree to deliver their tax information to us in electronic format and to receive their tax information electronically in a portal at the end of the process. They receive a small discount to do this. In addition, our firm is paperless in our tax preparation, workflow and storage processes.

**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?**

Typically, around 10 hours per day. Moving all processes to the clouds has allowed us to be very responsive to our clients no matter where we are. I work on a Mac and often blog or work on business development in coffee shops throughout our city. But I am still in touch with our office and can assist staff when needed. I extensively use the following channels to communicate with staff and clients: direct messaging through Twitter, Facebook and LinkedIn; Skype for meetings around the world; GoToMeeting for staff and client screen-sharing, texting, and email.

Are you using social networking (such as Twitter, LinkedIn, Plaxo, Facebook) as a marketing tool for your practice/business ... or do you use such sites for personal use only? Have you gained any clients or seen other demonstrable benefits from the use of social networking?

Yes, we typically focus on the major social networking sites for marketing purposes: Twitter, LinkedIn and Facebook. Facebook is a combination of personal and business use. We also extensively use email marketing as a foundational hub for managing our messaging, branding and business development. We often get new clients through our online webinars and by pushing our message out through social media. We

maintain a specific defined process of how to bring all of these tools together so that

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

talking about your nose hair often allows people to reach out to you when they otherwise would not have (because all you talk about is geeky taxes). If people can relate to you (and people can relate to your everyday challenges and joys), then they will reach out to you. But on the other hand, there are no real rules to social networking that I have been able to find. I often avoid those who state what the rules are. Everyone will use social networking in his/her own way and will determine the benefits they want to get out of social networking before embarking on their own journey.

Do you embrace cloud computing?

Yes, we embrace cloud computing (and even teach courses on *CPAs Overcoming Client Objections to SaaS/Cloud Computing*). At the core of cloud computing is a totally new paradigm in doing business. And that paradigm is very fluid. It is changing and growing with the speed at which new business technologies are being developed (which is very fast). With that being said, we as financial and business consultants must always address a client's underlying process by which they do business (as mentioned in the welcome video on the front of our website). We address a new client's underlying business process and always address going paperless with clients when we talk about the cloud. This often leads to a few educational meetings about the cloud, what it means and whether it is secure or not. Successful sells on putting clients in the cloud should always involve heavy education up front so that the client knows what kind of changes they will experience in their business processes. Moving to the cloud for your firm and for your clients is a totally different way of doing business. You and your clients need to understand that up front before making the move to these new models of doing business.

How is cloud computing changing the accounting profession, and how concerned are you with the security issues related to cloud computing?

Where do I begin? This question cannot effectively be addressed with the limited

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

Technologies are being developed throughout our world and the issues that will make the adoption of moving your business online a *requirement* to continue to be competitive in our new profession. Specifically, a younger demographic of tax and accounting professionals is coming on the scene, and they see no issues with *beginning* their firm in the cloud. This allows them to be much more niche-focused, more competitive and able to serve globally. Traditional models simply cannot keep up. Additionally, the speed of adoption of new technologies will force firms into the cloud or they will potentially go away. Larger firms with hierarchical and larger management diagrams will not be able to leverage the agility needed to respond to the speeds of the release of online web-based apps. The adoption of these online web-based apps will be required to maintain market share and to remain on the cutting edge. In the New Firm, accountants must become students of the cloud and changes in technology on a larger scale. The profession is in flux, and the fluidity of change in the technology sector will allow some to stand out and others to go away.

And security is not the biggest issue. It certainly is an issue and is the one most often addressed, but there are security issues maintaining your own applications on your own server in your office. We've written a blog post on our **THRIVEal + CPA Network** site (<http://thriveal.com/2010/08/24/stair-step-your-clients-into-the-cloud>) that addresses how to talk about the security of the cloud with your clients. There will come a day when security will not be the biggest issue discussed about the cloud. Security is an issue that each service provider and client will have to address at some point, and they will move forward with the cloud when they feel they have properly weighed the risks of the cloud with the security that they feel the cloud offers. You cannot force this adoption. We can only provide excellent education on the matter (and thus we must become students of the subject). The cloud is secure. Period. But different people simply have to take the steps into the cloud when they are ready.

Do you foresee the majority of firms still implementing servers for the majority of

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

hindered to move their large multi-office multi-state offices into the cloud, and properly coordinate the transition effectively. And the fact that a lot of our technical software products are not being heavily offered by many innovative software providers (unless you want to pay an arm and a leg for it) makes moving all of our products into the cloud difficult. But it is happening. So I do believe firms will still be using servers locally in five years (or either switch to virtualization of their servers to online IT consulting firms). But the two options given in the question are not the only options. There is another option (and quite possibly many more). We have perfected models to move our firm into the cloud and do not need our server as much, and we have not needed to outsource this specialization to an outside vendor. The creation of online web apps (and the relational way in which they are supported) is now done in a way where it doesn't take a lot of technical abilities to properly implement the software for the firm's use. The software just works. Again, this look at using online technologies is certainly easier for smaller, more agile firms. Larger firms may still need the help of outside vendors to handle the management of their vast server needs. But even then, they should look at effective ways to outsource their servers to an online innovative provider where they are no longer tied to their offices. Here is a great video on this subject: <http://vimeo.com/7395079>.

Do you subscribe to a magazine and/or local newspaper?

No, I consume all media online. Online apps like Google Reader fill up my reading list automatically according to my predefined reading desires, and it's free. You can't beat free.

What ONE piece of technology could you absolutely not live without?

My iPhone. It does so much it's hard to describe. Some accounting processes can be completed on my phone, which also handles all of my calendar appointments, my To

Do list, my email, my business podcasts, connectivity to our firm's CRM, my Twitter,

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

Do you use online resources like webcasts for CPE training?

Yes, it's the future, dang it! But I also teach and go to live CPE sessions, as well.

Do you listen to podcasts?

Heck, yeah! Here are my top five, in no particular order (I can't pick just one):

1. Intersection Live from *The CPA Technology Advisor* – a must for CPAs interested in the crossroads of accounting and technology.
2. HBR Ideacast – Harvard Business Review's short and sweet bits of information that challenge every day thought and put you in touch with some awesome blog writers and authors.
3. The Economist – British dudes with cool accents talking about the economies of the whole world and what it means for lowly people like me.
4. Entrepreneurial Thought Leaders Series from [Stanford.edu](https://stanford.edu) – You hear from the biggest names in entrepreneurs, and how they did what they did.
5. Stuff You Should Know – Josh and Chuck are two cool dudes talking about stuff I would never think to even ask about (but which I find out I wanted to know about).

What is an “old school” business practice or process you'd like to see changed in the next five years? Casual Fridays.

What sports team/championship event do you absolutely refuse to miss?

I don't watch sports.

What are some of your favorite books, movies, music, websites, and TV shows?

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

Number of monitors on your desk? 2

What operating system and version of Microsoft Office is installed on your work computer? I use a 17-inch MacBook Pro, with VMWare installed to run Windows XP on my Windows side. I run Office 2007 on my computer, and will soon put Microsoft Office for Mac 2011 on my Mac in the fall.

Do you have children? Married 17 years, with 3 daughters, ages 12, 10 and 5.

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