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TECHNOLOGY

In Firm: Making The Smart Phone Decision

Column: Technology IN Practice

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Cell phones and PDAs (personal digital assistants) have come a long way in the last decade since most accounting firms adopted them for internal use. The convenience of being able to communicate from any place at any time and the ability to look up contacts and appointments fundamentally changed the way tax and accounting professionals and businesses worked. This is highlighted into today's personal communication devices that combine both these capabilities, often referred to as smartphones.

While there is no specific definition of what a smartphone is, these devices expand the traditional communications and applications capabilities of cell phones to include real-time e-mail and contacts access, Internet browsing, access to Microsoft Office and other documents, as well as the ability to extend Internet access to the owner's laptop through tethering. The difficulty today is in deciding the optimal device, platform and service for each firm to integrate into its current and future operations as the needs vary significantly from one firm to the next.

Decide on Primary Functionality

The first step should always be to decide what the primary functionality for the device will be from a firm-wide perspective, and there are usually two trains of thought focusing on either messaging or application functionality. In regards to real-time and secure messaging, Research in Motion's (RIM) BlackBerry has long been the standard for corporate America and most larger firms.

As well, those who prioritize real-time communications have also selected it over the past few years. In firms where access to contacts and calendars were the priority, the Palm OS (operating system) was traditionally selected. But with the advent of Exchange 2007, the trend has gone towards selecting the Microsoft

Mobile platform that could push e-mail as well as other contact data out as effectively as the BlackBerry devices. With the Microsoft Mobile platform included within Exchange, the cost to entry has been lower for Microsoft, causing RIM to lower the cost of its entry BES (BlackBerry Enterprise Server) to remain competitive.

Due to Exchange's lower cost and not requiring an additional server, many accounting firms have tended to select Microsoft Mobile.

Five Steps to A "Smart Phone"

Decision

1. Decide on Primary Functionality
2. Standardize on One Platform
3. Decide on Digital Cellular Service Provider
4. Select the Device (Smartphone)
5. Set Security Features

Standardize on One Platform

Please note that firms should always strive to standardize on one platform for ease of use and support. If the firm has already installed a BlackBerry or GoodLink server, or implemented Exchange 2007 and is utilizing Microsoft Mobile, it is best to standardize on that one platform, rather than trying to support both. It is also important to standardize the setup of each smartphone to make sure all needed functionality is included from the start, such as the "viewing" programs that will allow attachments to be opened.

While Microsoft Mobile devices natively open Word and Excel files, this capability can be added to other devices with third-party products such as DataViz Documents To Go. Firms should also consider how other communications such as fax and voicemail

are converted to the firm's e-mail system and sent to the handheld device as there are also PDF viewers and WAV media converter tools so that the handheld device can open them.

Decide on Digital Cellular Service Provider

The next choice is deciding on the digital cellular service provider, which is specific to each firm's area of operations. This is critically important for quality of phone service as well as Internet access, which can be utilized for connecting a laptop to the firm when the client does not provide the accountant Internet access. Please note that there is usually an additional charge associated with having the smartphone utilized for Internet connectivity, which varies significantly, as well.

Please also note that in addition to today's smartphones, there are also digital "air cards" that can provide Internet access in lieu of smartphone tethering. Most laptop providers can also provide an "integrated" air card solution, but I recommend against them as they lock the laptop to one service, and they cannot be as easily shared as the external air cards can be.

With today's digital cellular services providing download speeds anywhere from 100Kbps to 3Mbps, the service quality varies wildly, which will impact the success of the firm's smartphone usage. While the top speeds in most U.S. markets is around the 1Mbps mark, 3Mbps capability is available throughout Canada, and it is just a matter of time before U.S. providers have it in place, as well. Traditionally, Verizon has been the dominant provider in the top 50 U.S. markets, and Sprint has been strong in outlying or more rural regions.

AT&T/Cingular has had pockets of success, particularly touted by firms in Texas and the San Francisco Bay area, but the landscape is continually changing. For this reason, it is important for the firm to synchronize its digital cellular contracts to renew approximately at the same time and try not to commit beyond two years. It is recommended that all firms evaluate the various local providers every 18 months to see if a switch is warranted due to increased bandwidth and better cost.

Select the Device (Smartphone)

Once the server and service has been selected it is time to select the device. Generally, the two most common formats are the standard phone “slate” that has the keyboard integrated into one unit or those that have a slide out keyboard. The slate format is usually slimmer as evidenced by the Treo Pro, BlackBerry Bold and Motorola Q devices that have built-in keyboards or those that utilize touch-screen technology such as the HTC Touch, LG Dare and Apple iPhone.

Most of the slide out keyboard units allow for “two thumb” typing and work sideways so the screen has a wider view that makes it easier to read and navigate the screen. Such devices include the HTC Mogul and Samsung SCH-i760, and it is expected that BlackBerry will enter this market with its Storm device this winter. The best way to decide on a smartphone is to actually hold one and use the features. The slate phones are much more comfortable to use as a telephone (held against your ear), whereas the keyboard models are easier for more demanding texting and Internet browsing.

Set Security Features

Finally, since the smartphone has access to firm resources and can contain a significant amount of firm data, it is important that this data is protected. At a minimum, firms should require that a password is utilized of at least two characters and that it is set to erase the smartphone after a set number of incorrect attempts (no more than five). One of the benefits of having a centralized server is the ability to remotely “wipe” the data from the smartphone in the event that it is lost or stolen. Firms should document the process by which this is done and educate staff on this capability.

Today’s smartphones are a vital communications tool that should be included in every tax and accounting professional’s business arsenal. By first selecting the features that are needed and the best service where you work, you can be assured that your evolution to today’s smartphones will be successful.

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