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your first day on the job, fresh out of school and ... dumb as a box of rocks. Of course, you didn't know the last part.

Dec. 01, 2008

From the January 2006 [Tax Season Survival Guide](#)

Public accounting is a very special profession. I'm sure you each vividly remember your first day on the job, fresh out of school and ... dumb as a box of rocks. Of course, you didn't know the last part. You (foolishly) assumed that your education had readied you for the actual PRACTICE of public accounting. Little did you know that it hadn't. You knew theory but not practice. You knew what, maybe even why, but certainly not how. The current demographics of the profession tell me that chances are this happened a very long time ago.

In fact, I recently blogged about an industry leader quipping that "85% of the AICPA membership will retire in the next 15 years," again emphasizing to you the importance of deep professional experience. When I accepted responsibility for The CPA Technology Advisor, I did so with a visceral belief that the pages within each issue should always reflect such deep professional experience. I believe that the very best content for our magazine comes from practitioners — from thought leaders who are active in the profession. It comes from those who "eat their own dog food." That's why I still practice ... why I office every day IN a CPA office, surrounded by real, practicing accountants and their trials and tribulations as they seek to serve real, live clients in everyday, typical situations. It's also why we have assembled the profession's best and brightest to write for you in every issue. Not as journalists covering a story of which they understand only a little; but as experienced professionals, steeped in years of practice, all with deep professional experience. Each and every member of this team is dedicated to improving the professional lives of America's practicing accountants.

In addition to providing you with a few stats on each team member, we asked each

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specializes in micro computer accounting systems, information security, the Windows operating environment, eCommerce, handheld computing, systems development and project management.

He is currently an instructor for K2 Enterprises and a frequent speaker for the California Society of Certified Public Accountants (CalCPA), the AICPA and other state accounting societies.

He speaks on computerized accounting topics, information security, handheld computing, electronic commerce, Linux and the Windows operating environment. He has taught microcomputer classes for California State University at Northridge and has written articles for CSCPA Outlook, California CPA and the AICPA InfoTech Update. He is currently on the editorial board of the California CPA. He is a Sage ACCPAC ERP and Sage ACCPAC Plus Certified Consultant, a Windows Certified Professional and holds the GIAC Security Essentials Certification (GSEC).

David currently chairs the AICPA IT Executive Committee and serves on the Information Technology Alliance board of directors and CalCPA Council. He is the past president of the California CPA Education Foundation and an active participant with the CalCPA State Technology Committee and Westside Microcomputer Users Discussion Group. He is past chairman of the CalCPA State Technology Committee and former member of the AICPA Information Technology Practices Sub-Committee. He is a member of various other AICPA and CalCPA planning committees for courses, conferences and computer shows.

David's busy season survival tips:

- **Use dual monitors.** For those who've never tried using dual monitors, all I can say is "get on board!" The productivity boost realized by using two monitors vs. one is dramatic! Don't hold back; dual monitors provide instant ROI!

- **Get personal laser or multi-function printers for all key individuals.** With the cost

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been an embarrassing breach to take a hard look at how confidential client information is being protected.

Randy Johnston

Randy is executive vice president and partner of K2 Enterprises and Network Management Group, Inc. He is a nationally recognized educator, consultant and writer with over 30 years experience in strategic technology planning, systems and network integration, accounting software selection, business development and management, disaster recovery and contingency planning, and process engineering.

Randy has been an entrepreneur, technologist, and teacher for most of his career. He is not afraid to tackle a business management problem or to get his hands dirty answering a low-level technical question. He is best known for his early and ongoing expertise in networks including LANs, WANs, Intranets, Extranets and the Internet. His expertise has grown to touch virtually every technology in the marketplace. He is particularly well known for his technology update overview, accounting software, and paperless office expertise.

He has the ability to make complex technology understandable to any person. He has consulted for most leading technology companies in the United States. Randy still likes answering questions one-on-one so he can fulfill his personal mission: To help as many people as possible to use technology in the way it benefits them most. But he always takes time away from work to enjoy his family, church and civic organizations.

Randy's busy season survival tips:

- **Review** your paperless strategy before the start of tax season. Update processes

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Isaac is the technology editor and website content manager for *The CPA Technology Advisor*. He combines his background in consumer and professional-level computer applications and peripherals with a knowledge of the public accounting field to provide reviews of programs used by accountants in their practice, as well as software and other technologies that can assist an accountant's clients in their business goals. During his tenure with the magazine, he has reviewed more than 400 pieces of software and web-based applications.

Through his column, "Tips & Tricks," he provides further useful technology information, from when to upgrade computing systems, electronic security and other topical issues. He periodically covers stories in more detail through feature articles.

Prior to *The CPA Technology Advisor*, Isaac worked in high-tech public relations for agencies in Tulsa, Denver and San Francisco, overseeing the day-to-day media relations activities for several technology-focused clients. Isaac served in the U.S. Navy as a SeaBee equipment operator. Following his military service, he received a B.A. in journalism from the University of Oklahoma and is nearing completion of a graduate degree.

Isaac's busy season survival tips:

- **Check.** Verify that all of your new equipment works. If you have a new networked scanner, printer or other item, make sure it is connected properly and works from all workstations that will need to access it.
- **Train.** Make sure that you've taken the time to adequately train any new or temporary staff that may be joining during the crunch season. This includes office procedures for routing returns, printing, storage and other routines, as well as making sure they know how to use the software.

- **Prevent.** For your more complex clients, use a diagnostic program that compares

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Dave McClure

Dave is a technologist, editor for leading accounting trade publications, an expert in global technology policy, and a noted lecturer on business and technology. He currently serves as President and Chief Executive Officer of the U.S. Internet Industry Association, an organization he founded in 1994 as the primary U.S. trade association for broadband and the Internet.

A technologist by education and experience, David has held management positions in the Internet, broadband, computing, aerospace and environmental services industries.

He graduated from the University of Iowa in 1973 with a Bachelor of Science degree in Applied Science, and from Kent State University in 1982 with an MBA in Executive Management. He has since pursued further graduate studies in organizational development and technology.

Active in the online community since 1983, he is a regular contributor to business and broadband publications, has authored more than 25 white papers related to the Internet, and consults with government and Internet entities worldwide.

He is a recipient of the Cornerstone Award for leadership in the broadband industry, a frequent commentator on radio and television, and a leading voice in policy issues related to wireless Internet, Voice over IP, and broadband deregulation.

Dave's busy season survival tips:

- **Get your tech in order.** Run the update software for your anti-virus, Windows operating system, Microsoft Office, tax software, accounting software, wealth management software and other tools. In the midst of tax season is no time to find out about a critical patch that was missed. This is also a good time to double the

memory in each PC, upgrade printers to the newest generation of color lasers or

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any other factor during tax season leads to repetitive stress injuries, anxiety, data-entry errors and other problems. Tax season is difficult enough, so find a way to take a break for 15 minutes each day. I personally like the hunt-and-kill games like Doom3, but your taste may be somewhat less violent. A few ideas: Track down your family genealogy online, plan your post-season vacation in excruciating detail, or try an online bridge group on Yahoo! or elsewhere.

Brent Goodfellow, CPA.CITP, MCSA, MCSE, MCT

Brent provides expert technology services to BKR Fordham Goodfellow clients as the partner-in-charge of its technology division, One Tech. As a Certified Public Accountant and

a Microsoft Certified Systems Engineer, Brent enjoys demonstrating to clients how investments in technology can improve overall business results.

Brent started his career in accounting as a professor at Portland Community College and as a president of his own accounting and consulting firm. However, after being frustrated with the service and results he was experiencing with technology providers, he decided to become a certified technology professional himself. Since merging his company, Goodfellow Consulting, with Fordham & Fordham in 2000, Brent has focused his practice on technology consulting. He works with clients to understand the pains and challenges of their businesses and identifies technology services that enable businesses to realize their potential.

Brent still uses his training and experience as a CPA. He brings the professionalism and dedication of a CPA to his service delivery as a technology provider. His background provides clients with a better service experience, as well as more realistic cost and time estimates.

Brent's technology services include comprehensive technology reviews; telephony

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Brent is also a recognized leader in the accounting profession. As an active member of the Oregon Society of CPAs, Brent has served in leadership positions in the organization since 1982. Most recently, he has served as treasurer, director on the board of directors, and president of the Society. Brent has also held national leadership roles in the AICPA and has served on the National Advisory Board for Creative Solutions, Inc.

Brent's knowledge of and expertise with technology solutions is showcased in the column he writes for *The CPA Technology Advisor* and in articles he writes for the Oregon Certified Public Accountant.

Brent's busy season survival tips:

- If you haven't already, get a second (or third) monitor.
- Have your client source documents scanned and work from them.
- Build time into your busy schedule to read, pray, exercise and talk to your friends and loved ones.

Gregory L. LaFollette, CPA.CITP

Greg is uniquely qualified to help firms navigate through the technology maze to find practical solutions that work. He is currently the Executive Editor of *The CPA Technology Advisor*. In past lives he practiced for over 25 years in the large, local firm he founded in South Dakota and spent over five years as VP of Product Strategy for Thomson Creative Solutions. He left that position in 2003 to "reclaim my independence" and take editorial and strategic responsibility for *The CPA Technology Advisor*.

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of Tax and Technology Consulting.

Greg's busy season survival tips:

- **Consider pre-scheduling your appointments.** Unfortunately, I resisted this when I was actively practicing. Now that I've had the opportunity to visit so many of you in your offices, I've become a believer. Simply select a date and time and send an appointment card to your clients. With an assistant follow-up call, you'll easily pre-schedule 75 percent of your 1040s. It's an amazing timesaver.
- **Commit to handle things only once.** If you're dealing with an item, do whatever you can to "move it along," and do it NOW. Go through your clients' "stuff" and identify those items not included. Put the ball in the court of your clients. Don't let them off the hook. Get a solid date from them, add it to your tickler file, and then put the project away. Each project will move faster, and you'll have a greater sense of accomplishment.
- **Busy Season Weekend.** Schedule this right now — one special weekend, Friday mid-afternoon until Monday morning. A quick get away at a B&B, perhaps a ski trip, or a weekend in Vegas. Whatever it is, it'll make you more effective both before and after it happens. In our firm, we REQUIRED every person to schedule such a weekend. Some firms even provide financial assistance!

Lisa Kianoff, CPA.CITP

Lisa is President of L. Kianoff & Associates, Inc., which she founded in 1986. Her computer consulting firm has been a leader in helping companies strengthen their business performance with award-winning accounting and business management systems.

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Year and was inducted into the Alabama Women Business Owner's Hall of Fame. She has also been honored as one of the Top 10 Birmingham Women by the Birmingham Business Journal and was awarded the University of Alabama at Birmingham – UFO Alumni award (Unique, First and Outstanding).

She is active in numerous professional and community activities including the Alabama Society of CPAs, UAB Alumni Society, American Society of Women Accountants, The Women's Network, Network Birmingham and is a founding member and past President of NAWBO Birmingham. Lisa sits on the board of the Information Technology Alliance, TechBirmingham and Temple Beth-El, where she serves as Vice President. Lisa speaks often to groups and professional organizations on topics from accounting software and technology to business processes and leadership. Her spare time is spent with her husband Alan and their two daughters, Natalie, 18, and Hayley, 15.

Lisa's busy season survival tips:

- **Set Expectations.** One key to achieving great customer service is setting expectations, which is even more vital during this season. Communicate regularly with your clients about your hours, expected turn around time, e-mail and phone options for communicating with your team, and client deadlines for getting data to you. Eliminate surprises, and satisfaction will be high. Use all the tools at your disposal — your e-mail signature, a personal e-mail, a fax, your web site, voice mail and even snail mail.
- **Backups. Backups.** This is important year round, but more so during busy season when you can least afford to have to redo work if your system goes down. During this hectic time, do backups more often. Remember to also make sure documents on workstations and laptops are being backed up regularly. To prevent downtime with workstations, use a tool like Ghost to save images that are easy to restore if a

system gets damaged. Detail your plans for continuing work if a server were to go

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April 10, 2018 when you come back to the office the next Monday, arrive up there now and start making those calls.

Doug Sleeter

Doug is the Founder of The Sleeter Group, the national leader in QuickBooks training and consulting for accounting professionals, providing QuickBooks resources for small business owners, accountants, bookkeepers, QuickBooks consultants, CPAs and QuickBooks software developers.

Doug spent his early childhood in Fresno, Calif., moving to Santa Cruz, Calif. in 1974. In 1979, he attended the University of California Santa Cruz where he received his Bachelor of Science degree in Computer and Information Science. He worked as a staff accountant for several accounting firms including Stanley Dowling, CPA, Charles Strauhal, CPA, and Porterfield and Delancy CPAs. In addition to his accounting background, Doug has extensive experience in the software industry working with software developers and industry leaders such as Apple Computer, Adobe Systems, Silicon Graphics and Quorum Software.

Doug moved to Pleasanton, Calif. in 1989 where he currently resides with his wife and son. In 1994, he founded The Sleeter Group to provide QuickBooks consulting and training to small business owners and accountants. Since that time, he has taught over 30,000 QuickBooks users and accountants how to properly use QuickBooks software.

Doug was a pioneer in developing the first QuickBooks seminars in the country and was selected to develop early Intuit training materials. He continues to consult with Intuit on the development of the QuickBooks product line and consults with

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Doug is the author of numerous books and courseware materials and writes a regular column, The QuickBooks Advisor for The CPA Technology Advisor. His in-depth knowledge of QuickBooks and his “systems” approach to solving small business accounting problems has earned him the reputation of being one of the nation’s leading QuickBooks experts.

Doug’s busy season survival tips:

- **Install Groove.** This awesome utility (www.groove.net) allows you to synchronize copies of the same documents on all of your computers. If you work on a laptop and a desktop and a home computer, this keeps your data synchronized so you can work on the current files no matter where you are.
- **If you’re running old operating systems (Windows NT, Windows 2000, Windows 2000 server, Windows 98, or Windows ME), update to Windows 2003 server and Windows XP Pro.** New software from most vendors is beginning to require these new versions, and even if they don’t require it, you’ll be glad you upgraded.
- **Focus in 2006.** Huge opportunities are coming to the market — specializing in Point-of-Sale, Inventory Solutions, Time & Billing, Custom integrations, Ecommerce consulting, Business Analytics, or even in Microsoft’s SBA. Decide where you’re strong, and focus. There are so many great solutions available, and large niche markets are developing around them.
- **Most importantly, hug your kids.** It’s so easy to forget how important they are in your life. I recently learned a new appreciation for this as my son faced some serious health challenges. Don’t delay; go hug them today.

Roman is President of InfoTech Partners North America, Inc. and the Lead

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practices. Roman also served as the firm's administrative partner where he oversaw Internal Accounting, Marketing, Human Resources and was responsible for the creation and implementation of the firm's technology plan and budget.

He is currently the Chairman of the AICPA's Information Technology Executive Committee and a member of the AICPA's Special Committee on the Enhanced Business Reporting Model. He has also served as Chairman of the AICPA's Top Technology Task Force, and as been involved with the AICPA eBusiness, Best Practices, IT Research, IT Practices, and Group of 100 projects.

Roman was included in the Accounting Today Most Influential People list for the years 2000, 2001, 2002, 2003 and 2004, and was named a Technology Pathfinder by the AICPA's Vision Project.

Roman is also an Advisory Board Member to the Association for Accounting Administration and has served on the Board of Directors of the Arizona Society of CPAs. He has been a featured national and regional speaker to thousands of CPA firms on information technology. Recent speaking engagements include topics of Strategic Technology Management, Today's Digital CPA Firm, Security and Privacy, Technology Tools, and the Impact of Remote Computing/Virtual Office.

On a technical level, Roman is an AICPA Certified Information Technology Professional. He authored technology chapters for the PPC MAP Handbook, PPC Guide to Paperless Engagements, and sections of the AICPA MAP Handbook (Internet, Knowledge Management) as well as co-authored the 2003 AICPA Top Technologies Guide. He also authored the AAA Guide to CPA Firm Intranets as well as co-authored its 2003 Guide to Paperless CPA Firm Administration.

Roman's busy season survival tips:

- Standardize on dual monitors and provide training on to get everyone comfortable

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