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The universe of accounting and accountants continues to undergo major shifts. One of those shifts is the recognition that every-one can choose when and where they are willing to conduct business. This includes the 24 hour, 7 days per week model. Supermarkets are always open. Gas stations and bank ATM machines are always accessible. Customer support is accessible from locations around the globe. Las Vegas is no longer the only 24-hour business operation.

So how can accountants in public practice successfully utilize existing resources to enhance interactions with clients?

Accountants and clients communicate in a number of ways — face to face, telephone, paper correspondence, seminars and workshops, e-mail, IM, and so on. The first thing to realize is that, no matter the form selected, communication is a major requirement for the development, support and continuity of accountant/client relationships.

Technology is playing an increasing role in the capabilities of accountant/client interaction. Cellular phones and smart phones/PDAs certainly make returning calls and messages faster as they find people no matter where they are. Wireless hot spots allow ways for responding to e-mail and other messages. No longer is there a limit to the time that communications can occur. The 24-hour business day has arrived and is expanding.

General Internet-based Technology Solutions

The newest entry in the accountant arsenal is access to Internet-based applications

etc.

- **eNewsletters** — general, specific, personalized.
- **Blogs** — general or specific subject information.
- **Podcasts** — on-demand radio programs delivered via the Internet.

Of course, we can't overlook the wide varieties of telephone type devices that support "never out of touch" communications. Such devices include cellular phones, PDAs and pagers, all of which enable voice and/or text communications to any location. Now, whether you choose to answer the call or not is another matter.

VoIP

VoIP (Voice over Internet Protocol) continues to expand its impact and value for businesses of all types and sizes. New features with VoIP can not only match basic PBX systems, they can provide even more. For example, VoIP offers the following benefits:

- **Find Me/Follow Me** — call forwarding services where incoming calls can ring multiple phones either sequentially, one at a time, or all at the same time.
- **Integration** — use information direct from contact lists such as MS Outlook.
- **E-mail integration** — receive voicemails as e-mail attachments.
- **Remote calls** — make calls from any Internet connection.
- **Long distance calls** — one price from any location to any other.
- **Remote office** — all employees are connected through the same system, so that phone numbers and extensions are all part of one telephone number.
- **Scalable** — adding extensions for new staff is easy.
- **Continuity** — in the event of office disaster, VoIP systems can be set up and controlled from another location.
- **GrandCentral** (www.GrandCentral.com) — enables a number to be tied to an individual and not to a device or location. Also offered for mobile devices.

When considering ways to enhance communication with clients, VoIP systems

Portals come in many shapes and sizes, offering one of the following models, or some combination thereof:

- Provides current information generated from accountant or client data applications. This includes accounting systems, tax filing and regulatory data, practice management data such as time records and billing, and general business news.
- Internal company information such as CRM, individual time records, staff memos, policy manuals, training materials, etc.
- Knowledge-based information that supports access to frequently asked questions and other specific or general research requirements.
- Sales of products or services such as books, whitepapers, newsletter subscriptions, legal forms, computer products and repair services.

Many vendors provide web-based portals that are used by accountants to exchange and share information with their clients. These commercial sites offer a range of services that clearly improve and expand communications among accountants and their clients. A key element is how portals allow for data communications to occur efficiently and effectively through the 24- hour/7-day business cycles we are all experiencing.

You'll see similarities and differences among the vendors. The key (and I will repeat this again) is to find the service that matches the needs of your firm and your clients.

Most portals have a licensing-based fee structure that charges the accounting firm per user per month. Many vendors do not charge for client access through the portal. While it may be tempting to have only one user/password combination to save money, this is not a good management idea. Having each partner and staff person with their own user identification enables effective controls over system usage.

Portals offer information and links to other websites, and many are designed only for

ACCT1st (www.acct1st.com)

This portal focuses on the management of documents including the ability to manage the workflows surrounding documents from creation to archival storage. Source documents can be scanned into PDF format for better control and then published to the portal. Accountants can control access for collaboration with clients and store their backup data on Acct1st's server facilities.

AccountantsWorld (www.accountsworld.com)

This portal has a full complement of accountant-supporting applications, including accounting and payroll systems, fixed asset management and firm practice support. The accounting staff can access the web-based information as well as share sessions with clients in a collaborative environment.

CCH, a Wolters Kluwer business (CCHGroup.com)

This long-standing supplier of resources and services to the accounting community has a full range of applications to support the accountant's practice. CCH's portal provides features for file sharing, document management, client collaboration and data storage. All access to any document is logged, and e-mails can be issued based on any work done. Website support is also available including a focus on firm branding and identification.

Interwoven (www.interwoven.com)

Interwoven's portal provides content management solutions to accounting firms, law firms and consultants. Support is offered for the entire process surrounding accounting services, including practice management, billing, marketing newsletters, tax returns, etc. Additional resources support engagement management and website

development. E-mail traffic can interface with the accounting staff's Outlook files.

version of the file. Accountants can create journal entries and reports for analysis without corrupting any of the client's active data.

NetSuite (www.netsuite.com)

This portal focuses on three elements: CRM (knowing customer information, what they do and where they did it), practice management (access to financial data), and marketing of the accounting firm. Each element provides for client satisfaction and better collaboration among accounting and client staff. Document management provides for file upload and download along with a logging system of all actions. NetSuite also has an integrated suite of business applications including accounting, payroll, and time and billing.

Sharefile (www.sharefile.com)

Accountants, lawyers and other professionals use this portal to manage and exchange files. Password-protected folders can be set up on Sharefile, and files within each folder can be updated, transferred and downloaded. Each file can contain hyperlinks that enable connection to other files and websites. This portal also provides the capability to share a file though web pages so that individual files can be securely opened, edited and updated.

Thomson Tax & Accounting (www.cs.thomson.com)

With several software applications, Thomson's CS Suite provides lots of resources for the accounting firm and its clients. Products include accounting and payroll systems, tax preparation, practice management, document management, and a website builder. The systems provide for collection of original data and then processing through the Thomson applications. Clients can be given access to their data for viewing and updating. For the accounting firm, staff can enter timesheet data, client data updates and other information for the firm's practice management.

BizActions (www.bizactions.com)

BizActions also provides support for webinars for small or large groups. Meetings can be scheduled for training, desktop application sharing, along with file and document transfers. The application includes all administrative tools to monitor and manage attendees.

ClientWhys (www.ClientWhys.com)

Offering several tools for tax and accounting firms to reach out to clients and prospects, services available from ClientWhys include a variety of newsletters, brochures, marketing postcards and other materials. The monthly newsletters provide original and customizable tax and accounting content, including tax alerts, due date reminders, planning tips and articles written to engage clients and prompt them to seek your professional advice. ClientWhys also offers website services for tax and accounting firms.

Microsoft Office Groove 2007 (www.groove.net)

This application is the new Office 2007 application to enhance collaboration on documents. In addition, users can schedule and manage meetings and projects. The key function is to assemble all elements of a project — data, forms, files, calendars, etc.

Microsoft Live Meeting (http://office.microsoft.com/en-us/livemeeting/default.aspx)

This application supports all technical resources to have an online meeting among as many users as need to be brought together. All linking is done through an Internet connection. This program is used extensively by Microsoft to support online meetings, training and events.

Skype (www.skype.com)

Skype's VoIP supports making calls from your computer to anywhere in the world.

the entire document in its native format (spreadsheet, word document, tax return, etc.).

New features include the capacity to combine documents into a single file and then search through all files for words or phrases. With Acrobat 8, you can create forms that can be used for data entry with a variety of applications. The data entered can be collected and exported to *.CSV or XML files, which can then be exported to Excel or other applications. Sensitive and confidential information can be permanently hidden from unauthorized viewers through a redaction tool. This markup capability is similar to using a permanent black marker on the paper document. Redaction can be applied to text, metadata and other information that requires concealment.

Using the PDF format enables control and management of a all documents including workpapers, financial reports, tax returns, e-mails, spreadsheets and more. Users can combine all of the aforementioned document types for sharing and collaboration activities.

Another feature supports document review and markup. The document can be sent to any number of people for review and comment. Each individual can annotate, make changes and add notes. All comments are indexed for easy review by the document manager. This feature is several steps ahead of track changes.

Adobe Connect (www.adobe.com/products/acrobatconnect/compare)

The newest member of the Acrobat family is Acrobat Connect, which is intended for the creation of a very usable collaboration environment. Connect is a hosted service built on Flash technology originally developed by Macromedia, now owned by Adobe. The service is provided by Acrobat on a monthly or annual fee of about $1/day.

A user session can be easily set up, and users are invited to participate. Users sign in

the maximum number of participants is 15. This should be plenty when collaborating with a client or communicating with your grandchildren.

CONCLUSIONS

The 21st century business functions 24/7. It is essential that accounting firms develop the capacity to support this business world. Clients desire it, and the accounting firm staff members require it. To be in this business support mode, it is essential for accountants to learn about the variety of web-based resources described in this article.

Accountants have to practice attentiveness to client requests and actions that should not have to wait until someone can set up a face-to-face meeting in someone's office. Moreover, it is essential that data and information be current. That means the most current tax return, financial statement or audit analysis needs to be accessible by everyone who needs to work with this information. Old data is not typically useful. The growing shift to technology-based communications is pushing accountant/client relationships to new levels of professional expertise and quality. Accountants need to select the services that match best to their needs and the needs of their clients.

Technology

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