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From the Oct. 2009 Issue

How well can your firm perform? Do you have the right clients, employees and technology? Are you making the right decisions to improve your firm? Are you being proactive? Economic conditions may be on your mind and influence you to make passive or conservative decisions. A down economy may be just the right time to create new client services that support business goals, and technology may help you reach these goals.

YOUR NEXT ROUND OF TECHNOLOGY CHANGES HAS ARRIVED

This column is being written on a new computer running the new **Windows 7** operating system with

Office 2010. In fact, no software I'm using today is the same version as it was a year ago. This technology wave does not seem as disruptive as the last one, and the applications seem more compatible with each other and my specialized applications. I think you will find your situation similar.

Purchases in late 2009 and early 2010 will begin adoption of the next technology wave. Consider that for any machines purchased in this timeframe, you should do the following:

- Have Windows 7 Professional so you can run Windows XP mode.
- Have dual processors with at least 8GB of RAM.
- Convert any OEM licenses of Windows or Office to Open Licenses with software assurance within the first 90 days of purchase. This will accommodate upgrades to Office 2010 and more virtualization over the life of this acquisition, as well as permitting employees to use a copy of the new MS Office at home.

- Plan on training your people on the new version of Microsoft Office and

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SO WHAT TECHNOLOGIES COULD HELP ME SERVE CLIENTS BETTER?

Asking a few other questions can help you better answer this question. What do my clients want and need? What would make my employees more efficient? What is practical and simple? What can improve the business workflow? What would advance my business goals and initiatives? We suggest creating a list of all items you believe would help the organization.

Some current winners in technology include the following:

- **Workflow Software**
 - XCM Solutions (xcmsolutions.com)
 - CCH WorkStream (tax.cchgroup.com)
 - Thomson Client Flow (cs.thomsonreuters.com)
 - Metastorm (metastorm.com)
- **Paperless** — Really, there are too many good applications to mention here. See www.totallypaperless.com.
(And also see *The CPA Technology Advisor's* Free [Document Management Selector](#).)
- **1040 Workpaper Products**
 - SurePrep 1040SCAN (sureprep.com)
 - ProSystem fx Scan (tax.cchgroup.com)
 - Copanion Gruntworx (copanion.com)
- **SaaS (Software-as-a-Service)** – A few of my favorites in this category:
 - Thomson GoSystem Tax ES (cs.thomson.com)
 - Conexxus (conexxus.com)
 - AverQ (averq.com)
 - Avalara AvaTax (avalara.com)
 - Intacct (intacct.com)

- Sage Billing Boss (sage.com)

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that could provide you with multi-point voice or video services that save money and may improve voice quality.

- Skype (skype.com)
- Microsoft Office Communicator (office.microsoft.com)
- Oovoo (oovoo.com)
- **Web Meetings** – Here are a couple, but there are many other vendors who supply live meeting applications.
 - Adobe Connect (adobe.com/connect)
 - Microsoft (Microsoft.com)
- **Web Productivity Applications** – Many technology vendors offer products that can supplement the day-to-day use of Microsoft Office.
 - Google Apps (google.com)
 - Microsoft Office Web Applications
 - Zoho (zoho.com)
- **Protection Services** — These products can keep your office safer:
 - DoubleCheck Email Manager (doublecheckemail.com)
 - NetRescue backup appliance (nmgi.com/NetRescue)
 - Anti-virus software such as Vipre (sunbeltsoftware.com)
 - and Email archiving from players like Autonomy Zantaz (zantaz.com) or Google (google.com)
- **Virtualization** — This is a wise investment whether on servers, desktops, laptops or virtual desktops. No new technology installation should be implemented without considering virtualization.

These 10 categories represent only a few of the opportunities from new generation technology. There are many more to consider when you realize what you can do with new cell phone technology, wireless, accounting software, financial reporting

or other categories of technology. For example, in cell phones, the iPhone

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Step 1: Plan for success

Numerous technologies can help with day-to-day issues. For example, sharing a cellular broadband connection is trivial to do with a CradlePoint (cradlepoint.com)

wireless router. Setting up the sharing between devices is much easier with software from vendors like Colligo (colligo.com).

We take wireless and wired connections for granted since they are so easy to create and maintain with products from vendors like Hewlett-Packard (hp.com), SonicWALL (sonicwall.com)

and others. The point I'm trying to make here is that if you can name a problem, there is probably a vendor who has created a product to solve the problem.

With so many opportunities to improve your operations, limiting the tasks you try to complete will be your biggest challenge.

WHAT TO PLAN FOR, WHAT TO PICK

There is no one right way to choose technology. We recommend that you list the top issues or strategic initiatives in your organization. Force order rank these items. Look for solutions to the specific issues or initiatives. Do not expect one supplier to have all the solutions to all of the problems. Do not expect your IT staff to name the issues or solutions for you. Do expect that you can solve any of the issues that you can name. Someone will have a solution, but it may take you a while to find it. Be cautious about claims made by some vendors: too much or too little cost, ease or difficulty of creating a solution, that there is only one right way to solve the problem, that there is undue risk by trying a new vendor or approach, that the timeframe is too long or too short, that the only solution is quite expensive, that running SaaS applications is

too slow and puts your data at risk, that ongoing maintenance is needed for

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the next initiative. Each new technology initiative will improve your competitive edge slightly, assuming that you have chosen projects that are in the best interest of your clients, employees and the firm.

CHANGE IS PERMANENT

The only guarantee that I can make about technology is that it will change. Sometimes the change is for the better, sometimes not. Sometimes the change is highly disruptive, sometimes not. Sometimes the change is so extraordinary that it is revolutionary not evolutionary. It is hard to tell without trying. Don't give up experimenting with new technology. It may seem tiring, costly and trying. However, not using new technologies is more inefficient, costly and disruptive and puts your firm at a competitive disadvantage. If you choose not to use the new wave of technologies, it will most likely cost you more when you have no choice but to catch up. You will provide better client service by focusing on the best way to solve client issues with technology primarily because you will be focused on what the clients want. How can you do much better than that?

Technology

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