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BUSINESS MANAGEMENT

Are you a Cobbler?

Rene Lacerte • Aug. 29, 2012



From the September 2012 Issue.

This issue is all about cloud technologies and how they can help you grow your practice while making your customers more satisfied and successful. There is no denying that this is the platform for technology going forward and yet I am often surprised to learn that many firms have yet to adopt cloud technologies in the simplest of ways. More surprising though is that I have noticed many firms adopt some cloud technologies for some of their clients and yet have done nothing in the cloud to manage their own back office. Hence, the reference to the cobbler and the old saying that the cobbler's children don't have shoes.

I presume that the reason the cobblers children don't have shoes is that he is too busy making shoes for "paying customers". It is not that he wants his children to be deprived and run barefoot. Imagine though that if the cobbler made the time to make shoes for his children and then paid attention to how the shoes wore over time on a daily basis. Undoubtedly he would get suggestions from his kids. He would learn something about making shoes that he could extend to all his customers, thereby getting happier customers and making more money.

This type of intimate product knowledge is at the core of everything I do. It is how I learn to make better things for our customers. It is where I get my best ideas. My belief is that you should do the same as you and your firm transition to this new technology called the cloud. Adopt services that you need to run your firm first before having your clients use some new tool. In the process of adopting, you will experience what your customers will experience and will be better able to serve them through the transition.

By testing out applications that are core to running your business, you will be exposed to all sorts of features and benefits that could also benefit your customers. . This will allow you to leverage your knowledge and experience from a personal perspective. At both PayCycle and Bill.com, I put our 401k, accounting, payroll, bill management, filing cabinet, and email in the cloud. You can do the same.

By the way, putting your accounting package in the cloud through a hosted solution is not the same as using a cloud-based solution for your accounting. While you get remote access from anywhere, there are a number of features that are missing. The experience is completely different. Today there are a number of cloud based accounting applications from Xero, to Quickbooks Online Edition to Intacct or Netsuite. So unless there is a specific feature missing, I strongly encourage a cloud solution to automate the entire general ledger.

Moving your back office processes to the cloud is a big project so unless you are starting your firm from scratch, tackle one area at a time. Our most successful customers do this by developing a schedule for adopting certain technologies over time. This way they make measurable progress and don't get overwhelmed or left behind. If your firm is big enough, assign someone to the task of getting the cloud integrated into your firm. For that matter assign someone under 40. They are already more connected to the cloud and will see lots of opportunities to move forward. You can even highlight their efforts internally and externally. Who knows maybe they should be on next year's 40 under 40 list.

Being able to talk passionately and from experience about the cloud will make all the difference to your customers. They will feel your energy and your guidance will exude more confidence. You wouldn't go on an African safari without a guide who knew the way so don't let your customers go into the cloud without your first hand knowledge.

So don't be like the cobbler. Experiment with the Cloud in your own back office and learn first hand the benefits that your customers can enjoy too.

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