Management system for small and mid sized accounting firms

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Isaac M. O'Bannon • Feb. 19, 2013

Feb. 19, 2013 – Mike Giardina is on a mission to improve the way professional

The CEO of Office Tools Professional, a developer of workflow technologies for small and mid-sized accounting and other professional services firms, Giardina spoke on Monday during a round table panel discussion with the accounting profession's most influential thought leaders.

The nearly four-hour session was the final technology vision presentation of the 2013 Thought Leader Symposium, which brings the top thought leaders and consultants to the tax and accounting profession together with leading technology vendors serving those professional firms. The event is hosted annually by CPA Practice Advisor, a national publication and digital resource for tax and financial professionals. It is being held at the Omni Mandalay hotel in Dallas, Texas.

"I believe practice management program is the most important system in a firm, because it brings everything together, allowing firms to operate to their potential," he said. The apps in the program must also be not only useful, but also immediately accessible. "People need to be able to find an use the parts of the system they need in a matter of one or two seconds, so that they can get work done."

Since founding Office Tools Professional in 2000, he's focused on designing a system that is easy to use, but also offers the real functionality that small and mid-sized practices need. From time tracking, contact management and client invoicing, to document storage, project management and scheduling.

The company is in the process of developing a SaaS version of the program, which thus far has been available installed or as an online accessible solution via hosting providers that include Right Networks, Cloud9 RealTime and other partners. They currently serve more than 1,500 accounting practices across the U.S. ranging from sole practitioners to firms with up to 80 staff members.

They started working on the new SaaS version in 2012, and already have mobile time

and around the tax and accounting profession, including time spent running his own 150-client tax practice, working at other accounting firms, and in IT consulting roles.

Office Tools Professional and all of its staff are U.S.-based, with company headquarters in Palmdale, California.

This was the final event of the 2013 Thought Leader Symposium, which ran from Sunday through Tuesday, with leading technology vendors discussing their plans for future development and growth as it affects practice of tax and public accounting.

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