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accounting firm. As you may know, I am the managing partner of an 11-person CPA firm in Bloomington, Indiana.

Darren Root • Feb. 27, 2013



Picking the right software platform is an exceptionally important decision in every accounting firm. As you may know, I am the managing partner of an 11-person CPA

firm in Bloomington, Indiana.

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beginning. During my search, I had several expectations. My “must-haves” included:

- Multi-tenant functionality within the same client
- Web connectivity
- Tight integration with an advanced portal solution that extended service to our clients' employees
- Scalability (we have a client with 800 employees paid bi-weekly)

For many firm leaders, the process for changing technology is to instruct someone in the firm to “make it happen.” I knew taking this route would be a mistake. This level of change is part of a firm owner's operational responsibility, and also offers an opportunity for firm leaders to evaluate processes thoroughly and redesign their firms for the long-term. As a firm owner, large-scale changes should positively support my broad vision for my firm. That said, it was a necessity that I be part of the process.

Our transition to a new solution set allowed me to apply the practical knowledge and expertise I had earned over the past 30 years of running my practice. This also represented an opportunity to examine all processes and procedures around our business segment of payroll and accounting and redesign it for the future. The insight I gained from being an integral part of the process allowed me to identify:

- The potential to build greater efficiencies
- The opportunity to enrich the client experience and elevate client satisfaction
- The opportunity to refocus staff members and train them to grow this segment of our business

I took the time to learn our new software platform inside and out. From there, I rebuilt our system from the ground up and trained our staff on a new and improved

way of working. At the end of the day, I invested a lot of time and energy. Don't miss

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practice. While I realize that firm leaders are very busy, I also realize the value of being part of this process. Remember, it's an investment in your future!

Firm Management • Technology

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