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stereotype of a stodgy old accountant that he has helped steer his firm towards technologies that have helped them more than double their client work volume in the past several years, as well as moving into new office locations.

Isaac M. O'Bannon • Apr. 02, 2013



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decade ago, shows the determination that he and the other partner members of the firm have towards growth: They want more, and they're investing in the technology and workflow processes in order to handle it, as well as actively seeking firms to acquire.

In 2004, when Long and three others merged the firm from prior practices known as Baldwin, Upchurch and Foley, and Long & Fisher, P.S.C., their goal was to build a practice for the future. One of the starting points was retaining the Baldwin name, which allowed them to have continued name recognition in the region and a name that wouldn't change over the years, even though there were no partners of that name.

Their largest initial step toward achieving their firm of the future, however, was being an early adopter of cloud technologies. That first year, they implemented an online professional accounting suite that "tied everything together," and heightened data security and also relieved them of many IT responsibilities and costs.

Since then, they've also helped move many of their clients to web-based business management and accounting systems that integrate directly with the firm's systems, and use online client collaboration systems. And, of course, they use portals that allow file sharing and client access to programs and other tools ... but the firm doesn't call them portals.

"The word portal is overused and clients really don't know what it means," Long said. "Almost everybody's using them, but banks and brokerages don't call them that, or retailers and other ecommerce websites, so why should accounting firms? We use the term that most people seem accustomed to: Secure Online Access."

These technologies have allowed the firm to grow throughout the state and also to attract clients around the country. In total, the firm's staff of 28 serves more than 700

business clients and 1250 individuals, with services including business valuation,

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That's a lot of tech, to be sure, but Long says the firm is also focusing on best practices for workflow.

"Our practice is better because of technology and because we're willing to try new things," he said. "We also bring in outside consultants to help us discover and implement better strategies, because otherwise, a firm's workflow can become stagnant and somewhat inbred."

Baldwin CPAs is a part of the Boomer Circles, and Gary Boomer has visited to do strategic planning, while other top consultants have included Gale Crosley, Allan Koltin and Ron Baker.

As a result of the firm's willingness to adapt new technologies and their embrace of new firm management concepts, Baldwin CPAs received a 600, the highest possible score on the Productivity Survey (www.cpapracticeadvisor.com/productivity), a free online technology and workflow assessment tool, which also offers benchmark data for other firms in an area.

Another result of the firm's success is that they've started consulting to other firms, as well, helping practices be more efficient and resourceful like Baldwin has. That activity, and doing specialty work for other firms, has been one of the ways Long and the partners have found firms that are prospects for acquisition. The latest resulted in the opening of their Louisville office on January 1 of this year.

With virtually all of the firm's professional programs being cloud-based, staff are much more able to be mobile, and also use various apps on their devices. The firm is also in the process of creating a custom app that will allow firm clients to explore the services that the practice offers.

As Baldwin CPAs moves toward a Value Billing system and away from hourly billing, clients will also be able to see how much certain services and bundles will cost.

Transparency in pricing has been one of the factors that many clients have most

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it's not IRS that was at fault, Congress created this one. And that's causing clients to be slower bringing stuff in. Even though we may not have been able to complete their filings earlier in the season, they seemed to think they couldn't even get started. So everything was delayed."

While it caused some overloading of the staff, even more so perhaps than a traditional tax season, he says that the numbers eventually caught up. "Sometimes we're at our most efficient when the workload is at its heaviest."

Long has certainly come a long way from 1984 when, after having worked at another firm, he opened his first practice in the third bedroom of a condo.

When not in the office, he's been especially busy over the years with professional organizations, serving as a former president of the Kentucky Society of CPAs, a member of the tech task force and peer review board for the AICPA, and is currently on the State Board of Accountancy. He is also a member of the compliance assurance committee for NASBA. In 2005, he was selected as a distinguished alumni of the Eastern Kentucky University's College of Business and Technology.

He isn't all work, though. When away from the office, he and his wife Teresa enjoy riding their Harleys, and have ridden to the Sturgis, South Dakota motorcycle event nine times. Teresa owns a local bookkeeping office.

He's also a fairly new Papaw to his stepdaughter Lee Dale's 3 year-old daughter, while son Justin is starting his own new business. Alan and Teresa attend Tate's Creek Baptist church, and he is the prior director of God's Outreach food pantry.

Considering all of the changes that Long has seen in the profession over the years and the successful practice he's helped build with his partners, his favorite quotation is quite fitting.

“It is not necessary to change survival is not mandatory.” ~ William Edwards

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Info Box

Productivity Score: 600

G. Alan Long, CPA.CITP, CGMA – Managing Member

Firm Name: Baldwin CPAs, PLLC

Location: Richmond, Louisville, Lexington and Maysville, Kentucky

Website: www.BaldwinCPAs.com

Practice Specialties: Audit, Business Valuation, Banks, NFP, Contractors, Governmental,

Education: BAs in Accounting and Finance, Univ. of Connecticut; MBA, NYU Stern College of Business.

Favorite Vacation Spot: Sturgis, S.D.

Social Media:

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