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What are the key areas of your firm that have seen the greatest change in workflow over the past few years? Are you using automated workflow tools? The greatest changes have come from implementing a paperless office. We started scanning all tax documents in 2011. This required a well-documented workflow plan and uniform naming conventions. Overall, the process was extremely beneficial in finding efficiencies in our practice.

Have you embraced cloud computing for your practice? Are you moving your clients to the cloud? We have embraced the cloud! We have incorporated a bill pay program as part of our accounting service. We are moving our payroll clients, gently, to the cloud by offering a completely paperless payroll service.

On a broader scale, how do you see new technologies changing the accounting profession in the near term (3-5 years)? We are going to see more collaboration real time with our clients accounting systems. This will provide great opportunities for accountants to provide additional services beyond year-end tax preparation.

How mobile are you regarding your work? How have mobile devices and apps impacted your productivity and work-life balance? I try my best to maintain a healthy work-life balance, especially in the months after tax season! I enjoy travelling both professionally and for recreation, and so I consider myself very mobile. I take my iPhone and iPad with me on all trips. I can troubleshoot any problems as they arise and stay on top of email. The challenge of being mobile is knowing when to turn it off *and take some personal time*.

Have you found business success via social media, either via recognizable ROI, new customers, marketing or networking? Social media has been a helpful marketing tool for our business. Our presence on various social media sites as well as our use of email marketing allows us to communicate with clients and the community in a new way. Rather than our clients thinking of us as simply a tax

preparations service, social media tools help us educate the community about the

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dedication to the community are priorities. Therefore, we strive to not only provide useful financial information, but we also keep our friends and clients informed on our community involvement.

What single piece of technology do you find the most important in your professional life? My scanner is vital in keeping up with my goal of remaining 'paperless'.

NOT including your current employer, what company do you most admire and why? I admire Rootworks for their firm support and networking resources. I also admire Wegmans for their innovative approach to all aspects of grocery shopping.

What brand/model mobile phone do you use? iPhone

Do you use a tablet for work purposes? Yes, an iPad

What is your favorite accounting mobile app, and why? Evernote- I use this app to take notes while in meetings. It syncs a backup to my desktop. Also, I can take a photo of the agenda in a meeting and attach it to the minutes. No more need to have hard copies and no more need to wonder where you put that agenda!

How many monitors do you have on your desktop workstation? I use two monitors at my desk, as does the rest of my staff.

Read more about this year's [40 Under 40 Honorees](#).

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