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## FIRM MANAGEMENT

# Making the “Freedom To” Connection

When you hear the term “digital CPA” what do you think of? An accounting professional who is wired 24/7? A CPA who uses the latest technology to optimize their accounting practice?

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When you hear the term “digital CPA” what do you think of? An accounting professional who is wired 24/7? A CPA who uses the latest technology to optimize their accounting practice? Both could be used as a literal definition of what a digital CPA *does*, but if we limit ourselves to thinking about technology only as a physical tool that we use to do our work, we are, quite frankly, missing the point.

To me, being a digital CPA is about developing a practice with an optimal level of connectivity that allows us, and our businesses, to reach their full potential. As entrepreneurs and leaders, our job is not to work *in* our firms...it is to focus on the future of our companies. I learned this the hard way after twenty years of working long hours, under high stress, dealing with mountains of paper-based records.

Near the point of burnout, I knew that if this was how my practice was going to continue to operate, I was not going to be able to do the things I wanted to do outside of it—and it definitely was not going to be a business that I would want to pass down to my children, if they chose to follow in my footsteps. This is when I realized that I needed to utilize digital tools to create a “freedom *to*” connection in my firm.

While on the surface the adoption of web and mobile based technology may seem like an attempt to obtain freedom *from* things such as long hours, high stress, volumes of paper, and doing work outside of our core capabilities—if you look more closely, it is really about creating a level of connectivity in an accounting practice that gives both you *and* your clients the freedom *to*.

For you, the connectivity of being a digital CPA offers the freedom *to* do things that you want to do, like spend more time with your family and or taking an extended vacation. For your clients, it provides the freedom *to* accomplish their accounting and access information conveniently and securely, through the channels they prefer.

In addition to improving the efficiency of your firm and enhancing the services that you provide, using the Web and mobile technology to develop a high level of connectedness also represents a new way of thinking about how you market your firm. In today's world, successful businesses and brands are not static. Instead, they use digital tools to better serve their clients and to develop connections that are meaningful and lasting.

As author and professor Clay Shirky said, “It is the people who figure out how to work simply in the present, rather than the people who mastered the complexities of the past, who get to say what happens in the future.” There is no doubt that today, and in the future, firms that use digital tools to become intimately aware of their clients, more agile in service delivery, and actively engaged with clients and prospects will outperform those that don't.

Developing both a “freedom to” mentality and a state of true connectedness in your firm is a critical part of becoming a digital CPA. Making this kind of “freedom to connection” focuses our efforts on what the end game really is—to have a business that supports the life we want, while providing clients with the highest quality of service.

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