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Marjorie Adams – 32

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What are the key areas of your firm that have seen the greatest change/challenge in workflow over the past few years? (Or, what are the key challenges you see firms facing?)

We are completely recreating our process management system. We have an

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use Microsoft 365 for communications, SmartVault for document storage, VOIP phone lines transfer to our cell phones, QuickBase for our workflow management (CRM, project management, time cards, engagement letters, order management), and our accounting file is hosted. We encourage taking "Work-ations" because any employee can pick up and work anywhere they need.

In what ways have you contributed to your firm/company to make it a better place?

We encourage people to *find* their place. Sometimes, this is difficult, as many people like knowing their role and having a tight job description. We encourage employees to look at where we are lacking and come up with the means to fix the hole. This encourages entrepreneurship and leadership, which are big factors in our recruitment as well as what makes our consultants successful to their clients.

In what ways do you participate in either the professional community or your local community to help others?

Professionally: I have worked as a mentor or sounding board to several of my peers for years. We first started by having local meetup groups with others in our world so that they would have a place to find the answers or talk through a particular client situation.

What major changes do you foresee in the accounting profession of the near future (3-5 years)?

People will continue to move online, of course. Since the last 5-ish years, the focus has been on speeding up the daily life of the consumer, I hope we will now start to see more products that speed up the life of the employee and the business. The market is flooded with tons of products that do this; hopefully, these will start to be weeded

out to the products that are sustainable and supportable.

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focus on the “why” instead of the “how to,” I hope the education in accounting expands.

What is your career philosophy?

I care about two things with my clients: honesty and providing a solution. We tell clients the workarounds and how to push software to its limit, but we are also transparent as to the limitations of the software. We will provide a solution if the software is limited. I have focused on never having to tell the customer that we *cannot* handle the situation. We give them options for possible fixes and price points for future sustainability.

Not including your current employer, what company do you most admire and why?

I learned a lot about company culture and partnering potential from The Table Group. There are several moving parts at this company, including books, training partners, public appearances and online orders. Figuring out how these pieces mesh together, without creating an overwhelming administration burden, is admirable. The culture allows for the people to be creative and express their ideas. The partner network is based on trust and communication.

Describe one person who has been an important mentor to you and how that person helped change your life.

I am going to give two:

- **Tammy Ferraez** – Tammy was my manager at my first job in the consulting world. I left private industry for what I call my “residency” hours put in at a large CPA firm (Armanino McKenna). Tammy taught me the basics of the accounting world – workpapers, reviews and tax return prep. She also gave me a huge opportunity

when Intuit approached the company to start selling their software at the

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As I did the marketing and business development for our company, I have learned so much about structure, page layouts and marketing ads, even to the point that we will market something small to draw the customer in, then hit them with what we really want to sell. When I go to clients, this knowledge has been a game changer because I can speak to the entire business. These experiences have also strengthened my consulting abilities.

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