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main issues to be alert to. Consultants may do a good job when contacted, but ...

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Recently, a panel of Chicago area IT experts addressed my small firm roundtable group. We were privileged to have with us Terry Beyersdorfer, Director of IT at ORBA, a \$20M firm and Matt Schoenfeld, who manages the IT strategy and implementation at \$11M Mowery & Schoenfeld as their Admin Partner.

Here are some gems:

**Online back-up.** The key: The program you use should make it easy to restore data.

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**If Terry or Matt were hired by one of our firms to do an overall IT assessment, what would they focus on the most?** Use of multiple monitors, backup internet connection, up-to-date equipment, off-site backup, network effectiveness and extent that servers and workstations are current.

**Computers used by personnel when working remotely.** ORBA gives everyone an encrypted laptop. “We don’t want people working on their home computers; not secure enough.

**Use of public WiFi (Starbucks, hotels):** Panelists tell their personnel never to use them due to security vulnerabilities.

**Multiple monitors:** Three monitors is now the norm. Once monitors get larger than 24”, there are resolution issues.

**Password management:** Everyone deals with having several dozen passwords for various web sites, having to remember and change them. Panelists recommend use of software to manage this digitally: Dashlane and RoboForm.

**What directions, changes and innovations are on the near-term horizon?** More hosted sites. Security will remain a key concern. Identity theft is on the rise

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*Marc Rosenberg is a nationally known consultant, author and speaker on CPA firm management, strategy and partner issues. President of his own Chicago-based consulting firm, [The Rosenberg Associates](#), he is founder of the most authoritative annual survey of mid-sized CPA firm performance statistics in the country, The Rosenberg Survey. He has consulted with hundreds of firms throughout his 20+ year consulting career. He shares his expertise regularly on [The Marc Rosenberg Blog](#).*

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