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Meredith Root, CPA, MBA – 2016 40 Under 40 Honoree

Sep. 19, 2016



Meredith Root, CPA, MBA

Director of Operations

Rootworks

Bloomington, IN

www.rootworks.com

Q&A:

Aside from the accounting websites, which blog/website do you consider a must-read?

I read the Wall Street Journal, Harvard Business Review and Architectural Digest on a regular basis. Wall Street Journal keeps me informed of what is happening in the world and business. I use the Harvard Business Review as a tool to keep me thinking with an open mind on various topics and industries. I try to find unique takeaways from the articles and see if and how they can be applied to our organization. Lastly, I love reading Architectural Digest because it inspires me to keep a certain level of elegance and beauty in everything I do.

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

I spend most of my time digging into two main areas of the business: focusing on our processes and new ways to make our firm more efficient and scalable and improving the client experience. An intentional client experience is a core objective in our business. I continually go through every possible interaction people have with our organizations and define how we want them to feel at each point in their journey with us. I lead a group that is developing a new technology to enhance the client experience, we are focused on building a platform to help accounting firms manage their interactions with prospects and clients.

In addition to the above responsibilities I've also been tasked with growing our firm's national presence in the optometry niche.

In what ways do you participate in the professional community to change/improve the accounting profession?

I am a member of Intuit's Accountant Council, which is a group of accountants and consultants who meet with Intuit's Accountant Segment to be the voice of accounting professionals and provide input regarding the direction of Intuit's product development for accountants and their clients. In addition, the nature of Rootworks and my role within our company is to continuously find new ways to help accountants build a firm that supports the life they want to live – I truly believe we accomplish that goal every day.

In what ways do you participate in your local community to help others?

I am a co-leader for a Christian group of 20-something women in Bloomington, IN that focuses on young women supporting each other in their passions, goals and careers. We aim to encourage women at a young age that anything is possible if they set their mind to it.

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

Technology has and will continue to change the profession. However, the focus of technology to date has been on the back office – transforming the way we perform work for our clients. I believe in the near future there will be a shift in that focus to the front office. Consumers, more than ever, are making buying decisions based on the experience they have with a company, which includes their experiences with accounting firms. Firms must pay attention to their entire client experience journey from the first time a prospective client becomes aware of your firm, to onboarding new clients, and managing interactions with ongoing clients. Technology will play a huge role in facilitating and managing an effective and positive client experience.

How do you see yourself participating in shaping the future of the accounting profession?

I see client experience playing a huge role in the future of the accounting profession and I see myself being at the forefront of that shift by educating firms on the importance of their own client experiences and providing a platform to facilitate seamless client interactions.

What is your career philosophy?

Make a career out of your passion and you will never work a day in your life. In other words, do what you love and makes you happy.

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

My dad, Darren Root, has always been my mentor. He continuously pushes me to be a leader and be confident in myself, stand up for what I believe in, find beauty in the world and everything I do, and never stop reading or learning. He works with more passion than anyone I've ever met and luckily that rubs off on me – he lit that fire for me.

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