CPA
Practice **Advisor**

Over the past several months, I've been addressing issues involving "information overload" and how to more strategically use the communication tools and other technologies that seem to be increasingly controlling us and our time. From email to smartphones, general Internet usage, social media and instant communications like chat and text, we are seemingly inundated with information.

Recent studies by *The Wall Street Journal* and research firms Forrester and Basex have found that modern professionals are exposed to around 1.6 gigabytes of data per day. With this flood of incoming information, it can be challenging for many of us, certainly for myself, to make the greatest use of it. Since it comes at us in so many formats and each of these formats affects us in different ways, a good first step is to look at those channels and then find appropriate ways to manage the flow and, thereby, maximize the benefit we gain from the technologies while also minimizing the potential for distraction.

In my October 2010 column, I explored social media management techniques that can help firms be more productive and effective when using these relatively new phenomenons as firm marketing tools. And in my August column, I discussed email management tips.

For this month's column, I'm sharing some tips on streamlining general Internet usage, particularly with search engine functions and news browsing. Although the way we perform these functions is quite different and we are affected in different ways, they share a commonality in that the most often recommended strategies usually come down to applying more or less traditional management techniques to these new technologies: Plan, schedule, assess and adapt. Then repeat.

5 Tips to Optimize Your Internet Use

1. Use "advanced search" and toolbars.

Search Engines Are Dumb

Today's Google, Yahoo!, Bing and other search engines have come a long way since their initial inceptions in the mid and late 1990s. In the earliest days, they were often just lists of websites that had been developed with people submitting their own sites for consideration. Then came "spiders" and "bots," little computer programs that constantly zoomed around the Internet, following links and crosslinks and automatically compiling gigantic databases of websites, then providing a user interface (the search engine) for people to query.

Then came sponsored listings, which all search engines now do in a fairly obvious manner. These are businesses just like any other, so I don't really begrudge them for doing this, as long as they don't revert to the shadier tactics of making sponsored listings appear the same as other listings.

You Can Make Your Search Engine Smarter

The "dumb" part of search engines comes from the nature of their databases. They don't think and, despite things like predictive text, they don't usually have a clue of what you're looking for even when you insert a few words in the search field. That is, they will often return results that contain any or all of the words for which you searched, but they may be in varying orders. Searching for *7216* and *tax*, for example, might result in a website that includes the word tax and part of a phone number.

So be as specific as you can, and use the plus and minus symbols immediately next to words that *must* appear (or must not appear) in your search results. If you know a phrase that must appear, such as *due diligence* or *regulation 7216*, including these phrases in quotation marks for your search will be much more successful and generally faster.

It isn't really necessary to remember these advanced search techniques, however,

To read the rest of this column, including specific insight on the rest of these tips, please go to www.cpata.com/go/3075.

2. Set Up Automated Alerts

If you frequently search for the same subject, such as new tax law changes or issues involving your clients' industries, you can greatly streamline these tasks by setting up automated search functions that search as frequently as you wish and notify you by email of new items that match your search. The most widely known system is Google Alerts, but there are also options from Yahoo! and Bing.

Searches can be set to be performed daily, weekly or even as it happens, and users can have the systems only search specific types of websites, such as news items, blogs, videos or other sites. Another common use for these systems is to perform an ongoing search for your own business' name and those of its senior staff so that you know when you've been mentioned or referenced online.

3. Utilize RSS Feeds/News Readers

Over the past five years, the use of RSS feeds has become extremely popular. The acronym stands for Really Simple Syndication, and much like the automated alerts systems they help bring the news to you. However, in the case of RSS feeds, you tell a web gadget called a news reader (free from all of the search engines and other websites) to search specific websites, or parts of specific websites, for new articles.

In this way, RSS is different than the alerts, which search for specific words and phrases, because RSS gives you links and briefs of new articles from websites and blogs that you are interested or "follow." So while you may not read every article in

this publication, you can be notified, either by email of via a custom portal, that new

not-for-profit accounting, practice management and general practice.

4. Take Advantage of Search Engine Options for Customization

Earlier in this column, I noted that search engines are dumb and offered ways to use some of their advanced search capabilities. There are, however, ways to customize most search engines now. Most notable are iGoogle and MyYahoo. With the customization options these sites provide, users can tailor their home page to include not only search functions, but also instant access to their news reader accounts, alerts, email, ticker quotes, Twitter and Facebook feeds, integrated work/personal calendars, news links from specific media sources and many other options.

The end result is essentially a dashboard for most of your daily Internet use, with almost everything viewable from a single screen instead of having to go to multiple websites. To get started, just go to www.google.com/ig or my.yahoo.com.

5. Provide Client Portals

While you're in the process of streamlining your own Internet usage, you can help streamline some of your client interaction by providing client portals that allow your clients to access some of their financial information online. The systems use the same secure technology that banks and government entities do, so due diligence is covered as long as you're using a portal service from SAS 70 Type II compliant technology companies. All of the companies that offer professional tax compliance software and also offer client portals meet these AICPA data security guidelines.

The advantage of portals for your clients is probably easy to see. Online banking has taken off because of the convenience of being able to view account data and make real-time transfers between accounts at any time of day or night. Client portals for

accounting and tax purposes are similar in benefit, allowing your clients to pull prior

include the ability for clients to upload accounting data files to your office, and use payroll tools such as entering employee time or leave usage (if you provide payroll services). Among the most exciting new trend is the ability for a firm to even offer its clients web-based bookkeeping systems and programs like Microsoft Office and Outlook that the clients access through their secure portal on your firm's website. This can only strengthen the client relationship.

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The way we communicate professionally has changed so dramatically over the past two decades and, no doubt, will continue to change at perhaps an even faster pace. With that in mind, it's necessary to keep up with the latest technologies that help to streamline the others. Web-based tools like automated alerts, news readers, client portals and customized homepages can save real time over the course of a workday, and that might help with the ever-increasing challenge of managing information overload. n

Technology