

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us



Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

**Cell phone:** Verizon BlackBerry

**Favorite app:** I still have app envy because Verizon hasn't come out with a smartphone yet.

-

**Do you embrace cloud computing?** Absolutely! That was our model for XCM from the beginning. We're also proud to have XCM selected by AICPA subsidiary CPA2Biz for its Trusted Business Advisor® cloud computing platform.

**How is cloud computing changing the accounting profession, and how concerned are you with the security issues related to cloud computing?** Cloud computing's greatest impact is in liberating firms from the physical space limitations that have always existed, and the fact that it has made technology truly scalable. A two-person firm can have a similar technology infrastructure as a large firm; it's eliminated resource boundaries.

Security is an issue that will always need to be addressed in a profession that deals with private financial information. It existed when the profession was still moving around paper files. How we address it in this environment is different, and our IT professionals need to be more diligent in keeping abreast of changes as new technologies present new vulnerabilities. As a cloud computing vendor, it's our responsibility to safeguard that data for our clients, though.

**Do you foresee the majority of firms still implementing servers for the majority of their computing in their offices five years from now or do you think they will be outsourcing this component to vendors who specialize in this area?** I think there will always be firms that want to be able to see the server, but in the next five years I think more will move to a virtualized model. I'm not sure that will be the case for the *majority* that quickly though. In fact, industry consultants like Randy Johnston seem

to espouse a hybrid approach (at least in the near term) with a mix of Web-native

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

find new ways to reduce the carbon footprint of our Annual User Conference by hosting a green meeting.

**How many monitors do you have on your desk?** I have two in my home office; three at work.

**Do you use online resources like webcasts for CPE training?** Yes, webcasts are a great source for CPE training. They're convenient, there are typically more topics to choose from, and they tend to be technology focused.

**How many hours of the day are you plugged in and responsive to client needs? And what tools/products make it possible for you to have flexibility?** My BlackBerry allows me to be accessible around the clock if an urgent matter comes up. However, personally and for my employees, we really place a value on balance and have worked to create a culture in which we can all enjoy our personal time without worrying about monitoring an inbox.

Our client services group is the first contact for routine client needs, and they also utilize XCM to help them manage deliverables related to client service. XCM's My View allows each member of the team to easily see the status of the deliverables assigned to them from anywhere with a Web browser.

**Are you using social networking (such as Twitter, LinkedIn, Plaxo, Facebook) as a marketing tool for your practice/business ... or do you use such sites for personal use only? Have you gained any clients or seen other demonstrable benefits from the use of social networking?** We use social networking platforms not so much as a marketing tool but as a client communications platform. We host user groups on both LinkedIn and Facebook, and use the XCM Facebook page as a means to share information, updates, and multi-media like User Conference photos and videos with

our clients. Both platforms are also great vehicles for keeping connected to old

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

**Do you subscribe to a magazine and/or local newspaper?** I still get our local city newspaper and the Sunday *Boston Globe* for casual reading and local events. Many of the magazines I subscribe to for professional knowledge and news I still receive in print, but I rely on their electronic versions more often.

**What ONE piece of technology could you absolutely not live without?** This year, I still contend it's my laptop, but I suspect my answer may be different next year as products like the iPad becomes more ubiquitous and more apps are available for that platform.

**NOT including your current employer, what company do you most admire and why?** I would have to say Apple. I know that Microsoft is still winning when it comes to revenue, market share and even patents (300 patents to 30 according to a slide I recently saw Randy Johnston present). But something has to be said for their ability to dominate mindshare. Their innovation and ability to create new markets is amazing. A few years ago, no one had a smartphone, and today there are something like 250,000 third-party iPhone apps available.

**Do you listen to podcasts?** Yes, I do listen to podcasts. Do I get extra credit for saying that the Intersection LIVE is my favorite? In all seriousness, it *is* my favorite because there are always great guests talking about timely topics.

**What is an “old school” business practice or process you'd like to see changed in the next five years and why?** I'm pretty sure that this was my answer last year too, but I'll say it again because it hasn't changed yet — printing reports. In a digital work environment, by the time the report comes off the printer, the data is old. I think dynamic dashboards and real-time search capabilities will supplant report printing in the next five years as firms will be able to better interact with and react to the information presented online. Isn't the value in seeing that one member of your

staff is overburdened while another has capacity really the ability to dynamically

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

**What operating system and version of Microsoft Office is installed on your work computer?** Vista and Office 2007

Technology

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

© 2024 Firmworks, LLC. All rights reserved