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classroom.

**Hobbies:** Top hobby ... definitely working! I am very fortunate to have a career that I am truly passionate about, and when I put in long hours, it's not like "work" as many people think of it. Beyond that, I enjoy hot yoga, jogging, swimming and public speaking.

**Cell phone:** Right now I carry two phones, one for work and one personal. My work is an iPhone (which I love!), and my personal is a BlackBerry, which has been a reliable phone. I will be replacing my BlackBerry this month and am thinking of picking up an HTC smartphone — they are pretty impressive.

**Favorite app:** I love my HootSuite app on my iPhone because it keeps me connected with all of my Twitter contacts and allows me to stay "plugged in" wherever I am. I also love my TripIt app. For people that travel a lot, having real-time information on flight delays and gate changes is huge. Now, I just need an app that finds my luggage when an airline loses it (maybe there already is one?).

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**What are some ways your firm/business has gone "paperless" and/or "green" in the last two years?** Across Sage North America we have implemented several programs in our campuses to reduce and recycle our waste and ensure that our space is efficient. We have recycling programs in most all of our campuses. Not all campuses offer all programs, but we have developed those that are practical at each site. This includes paper, aluminum and plastic. For paper, we offer standard recycling and secure shredded recycling. We have also recently undertaken a project to have our aged stored files removed for recycling. We went through a campaign last year where we encouraged our staff to cut back on items that go into landfills. Part of

this campaign encouraged them to bring in a ceramic mug so as not to continually

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carpets, furniture, etc. We have a preference to buildings that have an active program for recycling and energy management. Energy Management includes HVAC system management, lighting controls, life safety controls, etc. Our new location in Tampa is in a building that obtained the Gold Leed Certification.

We are also working to reduce our paper usage through technology. As we replace the old copiers and printers, we are replacing them with networked multi-function devices that scan, fax, scan to email as well as copy and print. This encourages the use of scanning a document and sending it to yourself or others via email rather than printing and mailing the document. These are a few examples of how we at Sage are trying to create an environment that is happy and healthy while at the same time reducing our wear and tear on the planet.

**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?** I am plugged in 24/7, which typically includes holidays and vacations (and I like it that way!). As a previous business owner myself, I understand that most businesses don't have set hours; they are available when their customers or clients need them, and the same thing applies to the accounting profession. We need to be as responsive to our partners as they are to our mutual customers so I've always got my iPhone in hand. We've had instances where a partner has emailed me looking to connect with tech support on a Saturday night, and if I can assist, I don't mind giving them a call back myself so they can keep working through the weekend. In today's business environment, I think being accessible, responsive and agile is critical to success.

**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?** I am a big fan of LinkedIn and Twitter for business.

Twitter has been a great way to get information out to our partners and customers,

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Sage. We have a number of online communities that we head up or are part of on LinkedIn, and probably the best value I see in these online communities is the candidness of the conversations. People feel very “safe” posting feedback or opinions on online communities, and this can be a great source of information for our business. We have had a number of successes with social networking, and one of these successes was a university student (Andrew Yellis) that posted about Sage Peachtree on Twitter. Our Product Management and Marketing team got in contact with him, we flew him in to speak at a campus meeting in Atlanta, and this summer we brought him out for an internship with Sage ... all of this from just one tweet! We regularly get new inquiries, customers or partners from tweets that we post, as well as tweets from people outside Sage. Someone once said to me “I have no idea how or why Twitter works, but it really does,” which I totally agree with. Once you learn how to use it through a tool like HootSuite, it definitely has an impact on your day-to-day connectedness with the outside world.

**What pitfalls or what unwritten rules of social networking etiquette exist, which are frequently missed by others in the profession?** When it comes to tweeting, there are some areas I feel are important and relevant to anyone tweeting, not just the accounting profession. First, I actually think some people “over-tweet.” When I follow someone that tweets five times an hour (for example), I wonder if they have too much free time and often find what they are tweeting is not necessarily noteworthy, but rather their message becomes diluted due to volume.

Secondly, I think some people tend to over-share. This is another controversial topic, but I do think that when you are representing both your professional and personal sides, there does need to be a professional tone to your tweets. Your business contacts do want to get to know you better (at least at a high level), but I don't necessarily want to know the intimate details of someone's personal life. When I meet someone, have a meeting with someone I haven't met before or even when people apply for a role for which I'm hiring, I always look at their tweets and LinkedIn profiles (and of



course do a Google search on them!). This helps me get to know them better and sets

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and it's very important that we balance the needs of our existing customers with creating new products for new customers. Because of that, you will see us continuing to strengthen our existing desktop products while at the same time introducing various applications and connected services that live in the cloud.

**How is cloud computing changing the accounting profession, and how concerned are you with the security issues related to cloud computing?** Cloud computing is a "hot topic" right now in the accounting profession and is on everybody's radar.

Firms want to know how this new technology will affect them, when their clients will adopt it and how long it will be until desktop products are obsolete. Although adoption of various cloud computing applications is on the rise, I also think it will be quite a while before the majority of firms are living in the cloud with no reliance on desktop products. I think you will see more desktop products move towards hosted models to allow clients to experience the benefits the cloud offers, primarily being anytime/anywhere access and no need to continue transferring data files between the Accountant and their client, which can be an inconvenience to both parties.

In regards to security issues relating to cloud computing, I think this area has heightened visibility right now but I also think we need to remember that there are serious security issues every day with non-cloud based environments. Employees taking data home on flash (thumb) drives, or taking confidential documents from their employer are also real risks, and although cloud computing is more visible right now, I think in some ways it actually is more secure than the traditional desktop model.

**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?** Based on feedback from our partners and Sage Accountants Network members, I believe

accounting firms are more likely to outsource to vendors that specialize. At the

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in the profession, stories on upcoming leaders in business, opinions from some of the great thought leaders in the accounting profession and business success stories, and each of these publications offer these.

As of recently, I have stopped subscribing to some of my favorites (*Business Week*, *Harvard Business Review* and various newspapers) because their websites have much of the same content, and you can get all of the top stories online.

**What ONE piece of technology could you absolutely not live without?** Hmmm... this is a good question, and there are so many to choose from. I LOVE technology, and I'm waiting for the next iPad to come out this fall before I pick one up. I'm fairly confident the iPad will become my favorite. Until then, I would have to say right now it is probably my iPhone. I love that it is intuitive, it works exactly how a person would expect it to and there really is an app for everything. It is so simple and yet so amazing all at the same time!

**NOT including your current employer, what company do you most admire and why?** I really have a lot of admiration for companies that create a culture that empowers employees to "do right" by the customer. A great example of that culture is [Zappos.com](#). I remember a story where a Zappos executive was telling someone that his employees will do anything to help a customer out and when they challenged him on that, they called the Zappos toll-free number posing as a customer and asked the employee to assist them with ordering a pizza. The employee happily proceeded with the pizza order, even though they are a shoe reseller. I think companies that give employees enough ownership to make decisions and empower them to do right by the customer are admirable, and Zappos is just one example of that type of culture.

**Do you use online resources like webcasts for CPE training?** Over the past year, we have seen a real shift in the way both our customers, partners and Sage Accountants Network members want to take training, and online is becoming increasingly

popular. In the next year, as we continue to build out the free CPE sessions Sage offers

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**What is an “old school” business practice or process you’d like to see changed in the next five years and why?** My change is more of an “old school” mentality than a practice. I find that some “old school” leaders believe pay is enough of a reward for employees. I have even heard people say, “I give them a paycheck; isn’t that enough?” and the answer really is *no*. I believe employees are looking for careers that are enriching and rewarding and offer stepping stones to help them grow both personally and professionally. Especially in the case of Gen Y, employees will leave a job for one with lesser pay if they think it will be more rewarding. I believe modern day employers need to embrace a new style of leadership that focuses on employee satisfaction, which creates a culture of loyalty ultimately leading to a better customer experience.

An old school business practice that I think we need to keep alive and almost bring back is phone and face-to-face communication. We are becoming too reliant on technology (email, Twitter, LinkedIn) to build relationships, and I still believe there is no substitute for sitting down with someone face-to-face. That is why Sage has been on the road more than ever this year at various accounting events and shows, as well as promoting our “Listening Tour” kicking off this fall. We want to have a meaningful dialog with our partners and customers, and there is no better way to do that than face-to-face.

**What sports team/championship event do you absolutely refuse to miss?** Even though I’m not a huge sports spectator, having spent most of my life in Canada, hockey definitely has to be #1, and the Stanley Cup Finals is the one event I watch every year. That being said, with my recent move to Atlanta, I think need to pay more attention to NASCAR, football, baseball and a few others.

**What are some of your favorite books, movies, music, websites and TV shows?** I love reading, and although I don’t spend as much time reading as I would like, my favorite books are ones that give you a new perspective ... so when you finish the



book, you have some new skills to apply to your own life. Right now, I am reading

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**How many monitors do you have on your desk?** I only have one, but a big one (26-inch). Having a large monitor gives you the benefits of having two monitors without the split. It's great!

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

We are currently transitioning from XP to Windows 7 at Sage, and I'm looking forward to making the leap. My home computer has Windows 7, and the multi-tasking capabilities will offer huge efficiencies at work.

Technology

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