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Manager, SS&G – Certified Public Accountants and Advisers

Akron, OH

Education: BBA in Accounting, minor in Information Systems, Kent State University

Professional Associations/Memberships: AICPA & Ohio Society of CPAs

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getting directions, buying movie tickets or booking a dinner reservation. It is great because it utilizes the GPS on your phone to find your location and search that area. Poynt is a must for traveling.

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What are some ways your firm/business has gone “paperless” and/or “green” in the last two years? SS&G implemented the paperless initiative approximately five years ago. All information, whether related to a tax return, attest engagement or special project, is stored electronically. We have been utilizing client portals to transfer information back and forth with our clients and to distribute deliverables, such as tax returns. We also recycle paper, cans and bottles.

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? VPN, VoIP and smartphones allow staff at our firm to be available to clients at all hours of the day. I am plugged in most of the time to answer questions and assist staff.

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 personally use LinkedIn and Facebook. SS&G utilizes Twitter, LinkedIn and Facebook to convey information such as tax tidbits, video clips regarding the services we provide, career opportunities, relevant articles and community service projects. I have not personally gained any clients from social networking but have made connections with people who I had lost touch with over the years ... and you never know, maybe one day they will be clients of the firm.

What pitfalls or what unwritten rules of social networking etiquette exist, which are frequently missed by others in the profession? I believe when using social

networking in a business environment it is important to remain objective. Social

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are you with the security issues related to cloud computing? It is an additional valuable tool for technology delivery. Security must always be a priority consideration. Since firm assets may be stored (or travel) outside direct control, it has a broader security element to consider. It will require an understanding of the risks and any design considerations that need to be included. You must also work with any third-party providers to understand their approach to security.

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? It depends. First you have to understand "in their offices" can already take the form of a private cloud. SS&G does internal (private) cloud computing already today; staff just may not know it. Cloud computing is misunderstood. It does not mean specifically the outsourcing of all services. It is not necessarily a destination either. It means leveraging the cloud-based models (private, public, hybrid, etc.) to provision cost-effective solutions for our firm. To fully understand, you have to really consider firm size, staff count, services makeup, firm goals, access to expertise, vendor options and competencies.

Do you subscribe to a magazine and/or local newspaper? I do not subscribe to a local newspaper; I check the news online. I do subscribe to the *Journal of Accountancy*, *OSCPA Voice* and *The CPA Technology Advisor*.

What ONE piece of technology could you absolutely not live without? My BlackBerry. It allows me to work a flexible schedule but still be available to respond to clients or assist staff.

Do you use online resources like webcasts for CPE training? Absolutely. This is by far the easiest way to get information with minimal interruption of my day. I can

take an hour break and watch a webcast and then continue working without ever

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How many monitors on your desk? Two – a laptop and a large monitor that allows me to split the screen ... so it essentially feels like three monitors.

What operating system and version of Microsoft Office is installed on your work computer? Windows XP and Office 2007. We are currently testing Windows 7.

Technology

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