CPA Practice Advisor

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Today's Technology for Tomorrow's Firm

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- W-2/1099 Tax
- Time & Billing
- Website Builders

TAPPING INTO THE PAYROLL STREAM:

How one firm abandoned old biases and transformed payroll into profit

CYGNUS
BUSINESS MEDIA

October 2011
VOLUME 21, NUMBER 6

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Online vs. Face Time: Which Reigns Supreme?

With all the talk surrounding portals these days, sometimes we can forget about the importance of real-life, one-on-one face time with our clients. Portals and digital processes have certainly propelled firms in terms of efficiency — there's no denying the necessity of technology. But in the same breath, I ask you, "Are we losing touch with our clients?"

If you've read the majority of my past columns or heard me speak, I'm sure you might be thinking, "What is this guy smoking?" I write a lot about (and believe in) creating a collaborative, real-time working environment by building streamlined, technology-driven systems. I acknowledge this. But I feel just as strongly about not losing touch with clients.

A discussion around *online vs. face time* always makes me recall my days working for the Covey Leadership Group and facilitating "Seven Habits of Highly Effective People" courses. One exercise in particular comes to mind, where the class viewed a sketch of a woman. It never failed that half the class saw an old woman in the sketch while the other half saw a young woman. And both groups only saw one or the other — they could not see the image in a different way. When I brought the two groups together to discuss and explain what they saw in the sketch, the level of surprise among attendees was amazing. Until it was pointed out to them, they could not see the alternative image.

Of course, the purpose behind this activity was to help people understand that there is more than one way to approach and view a situation. Applying this to the profession, many firms cannot see "client service" in a different way. Several practitioners whom I talk to view face-to-face client service as an infrequent necessity, relying on technology the majority of the time to communicate and deliver services. I want to challenge this view.

> I WOULD SUGGEST THAT CLIENT SERVICE IS NOT CATEGORIZED UNDER ONE UMBRELLA OR THE OTHER (ONLINE OR FACE TIME), BUT RATHER IS DEFINED AS THE MANNER IN WHICH THE CLIENT WISHES TO BE SERVED.

I would suggest that client service is not categorized under one umbrella or the other (online or face time), but rather is defined as the manner in which the client wishes to be served. For some clients, that may be all-digital-all-the-time (though, let's not kid ourselves ... if we don't ever see the client, we do lose touch). For other clients, it may require more personal attention.

Consider how you can possibly maintain and enhance relationships with clients you never see. To stay attuned and in touch, I suggest a strategy that encompasses a multi-prong approach:

- Create an environment that offers clients 24/7 access to their financial information using advanced technologies.
- Develop a system that enables you to be highly responsive to your clients' requests and needs.
- Make sure your clients know that you are always "there" and available to meet with them if needed.
- Spend time each month reaching out to and checking in with clients; it's these little communications that create loyalty.

The key is to build an internal system that accommodates the full spectrum of individuals — from the "all-digitals" to the "needs-more-personal-attention" clients. Ultimately, you want to be able to provide services that support the way the client wishes to be served. It's a balancing act — one in which neither *online* nor face time reign supreme. But instead, it's one where they share the stage as equals. ●

M. Darren Root, CPA.CITP
Executive Editor

Darren is the Executive Editor of CPA Practice Advisor. He remains in public practice as the principal of Root & Associates, LLC, in Bloomington, Indiana, and is president of his consulting practice, RootWorks. He formerly served on the Board of the AICPA's CITP Credentials Committee and is a former member of the Board of Directors for the Indiana CPA Society. He speaks at dozens of professional organizations each year and frequently serves as a guest lecturer at Indiana University's Kelley School of Business.

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1 ON YOUR MARK
Download a free QR Code Reader app (such as i-nigma QR Code or Qrafter).

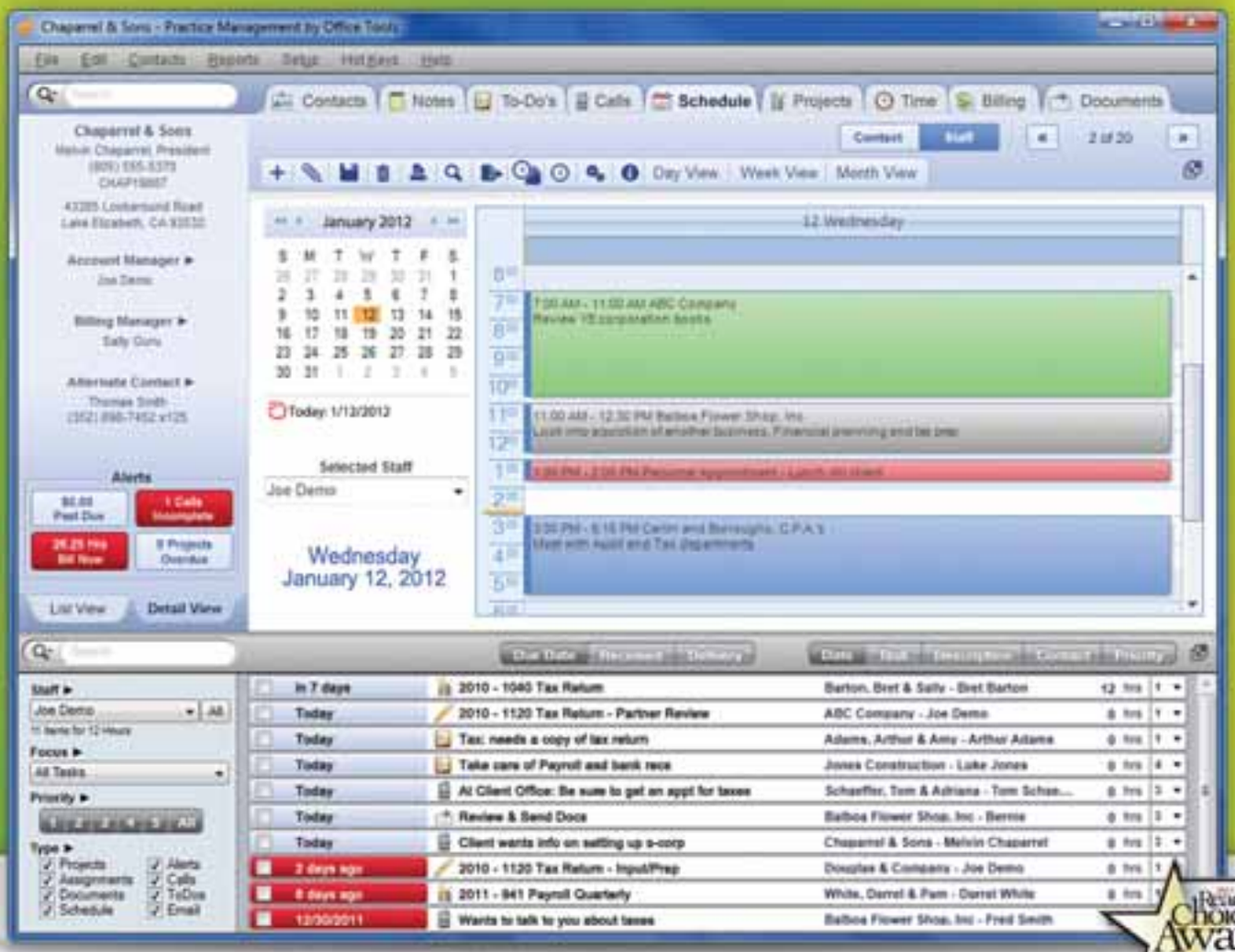
2 GET SET
Open the QR Code Reader and look for the tags in this issue (pages 2 & 36). Here's a sample that will let you connect with us on Facebook.

3 SCAN A TAG
Hold your smartphone's camera over a tag and – voila! – you'll be on your way!

It's time to get serious about

WORKFLOW

staff • tasks • documents • contacts • time • billing



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Tapping into the Payroll Revenue Stream

Abandoning old biases, Manning transformed payroll from a hassle into a 'hellavalota' opportunity and future profit

For years, Sean Manning, CPA and president of Manning & Company, PC, held fast to the notion that payroll was more of a pain than a profit-surging service. And he wasn't alone — most practitioners felt the same way … and still do.

"Payroll has the reputation of being a problem rather than a solution," Manning stated. "But the fact is that payroll itself is not the problem; it's how firms choose to handle it."

The traditional payroll services model houses payroll with other services — accounting, tax, audit, bookkeeping, and so on. Manning affirmed that for payroll to be a moneymaker, it must be segregated.

"Firms that follow the traditional model typically support fewer than 100 payroll clients … usually between 25 to 50 because that's all the firm can handle," Manning asserted. "Payroll requires its own system and a dedicated staff."

Manning bought his father's firm in 1998, but it wasn't until a decade later that he launched his lucrative payroll business, which he uniquely branded *Payroll Vault*.

"I am firmly in the payroll business now," Manning said. "After launching Payroll Vault in 2008, we more than doubled in size by 2010."

Traditional vs. New Payroll Services Model

Manning's service model carves payroll out from his firm's broad operations.

"Having payroll as part of my core accounting system doesn't work. Payroll requires a dedicated staff, not just a bookkeeper to handle payroll tasks as they come through the door … in between bookkeeping duties," Manning stated. "That's when payroll processing really does become a hassle."

In order to grow his payroll business beyond the profession's average of 25 to 50 accounts, Manning knew that he needed to establish a dedicated payroll department. So that's what he did.

Manning's "new" model segregated payroll from other services, complete with its own workflow system, technologies and staff.

"I knew I had to make a substantial investment up front to launch Payroll Vault," Manning recalled. "But I also knew that with a dedicated payroll business I could capture hundreds of accounts and process them with far more ease and efficiency."

At the core of Manning's model is growth. With an established system and dedicated staff in place, there is no payroll ceiling. His payroll business is well positioned for steady uncapped growth.

Manning recognized early on that to grow his payroll business, he would need to implement it in stages. He launched Payroll Vault with a payroll specialist, an operations manager, and a defined workflow process in place. From there, he would build onto the business as needed to keep up with growth.

"I took a staged approach with my payroll business. Once all the initial pieces were in place — technology, process and staff — I set a goal for increasing business the next year, and then the next. As needed, I invested in new staff and/or technology. At each stage of growth, there was an upfront investment, but ultimately, new business more than made up for it," Manning explained.

R. Sean Manning, CPA, President

Manning's big vision is to grow his practice to 500 payrolls over the next few years, and more thereafter. And with a structured plan in place, he's in a good position to make that happen.

Marketing & Sales: Key Components for Success

Like any firm, Manning has experienced client attrition.

"The average loss in the profession is about 10% a year — the combination of a bad economy forcing businesses to close, disgruntled clients that go elsewhere, or clients that decide to

STATS AT A GLANCE

Firm website: www.manningco.com; www.payrollvault.com

Year founded: 1977; purchased from father in 1998; launched Payroll Vault 2008

Total employees: 11 F/T

Home base: Littleton, Colorado

Firm description: Full-service public accounting firm with segregated payroll practice — Payroll Vault

Payroll app of choice: Thomson Reuters Service Bureau Payroll

Payroll Vault staff (left to right, front row): Malvina Messler, Client Relations & Business Development; Matt Sorenson, Payroll Specialist; R. Sean Manning, Owner; Marilyn Manning, Marketing & Business Development; (back row) Tricia Petteys, Operational Manager & Client Installations; Barbara Gunnufson, Tax and Operations Assistant; Sandra Babcock, Payroll Specialist

process their payroll in house."

Because client loss is part of running a business, Manning knew he needed to implement a marketing program to continually generate leads and keep the sales funnel full.

In 2010, Manning's wife, Marilyn, took the lead on marketing efforts. She attended seminars and events to generate leads. She also reached out to banks, attorneys and HR professionals to build a solid referral base. Within months, leads were flowing in. However, the problem was that there was no one dedicated to follow up with prospects.

"That's when I knew it was time to enter a new stage," Manning said. "I needed to hire a salesperson to manage leads, work the referral program and serve as the key point of contact for new business."

A full-time sales person represented another round of expense, which quickly paid for itself with 40 new payroll clients in less than six months.

"Marketing and sales are critical components of our business model," said Manning. "And firms that don't think so will find themselves stuck at 25 to 50 payrolls for the long term."

Testing the Waters Before Tapping into the Stream

Sean Manning didn't just jump into the payroll business blindly. He did his research. He spoke with colleagues and examined successful payroll operations within other firms.

"I learned from those around me who had already figured it out. I observed firms that were successfully running separate payroll departments … studied their operations." Manning explained.

Manning described this period as his *time in the classroom*. "I was patient … did the research required before taking a single step into the payroll arena."

Today, Sean Manning is at the helm of a successful accounting firm and a highly lucrative payroll business. In relation to Payroll Vault, growth has been steady. His phased approach to business growth has enabled him to more than surpass the profession's average 25 to 50 payroll accounts. In fact, his firm is approaching 200.

The days of viewing payroll as a headache and a hassle are long gone for Manning. "Payroll represents my bread and butter. I have a streamlined system in place, and I have the right people in the right positions to handle processing, broad operations, and marketing and sales."

The key message here: Adding payroll takes more than simply shoehorning it into existing firm operations. It requires doing some upfront research, creating a separate workflow, investing in the initial infrastructure, and building a dedicated staff to oversee operations and ongoing sales.

Those looking to tap into the lucrative payroll stream would be wise to study what Manning has done. His revenue stream is not simply flowing; it's raging.

Kristy Short, Ed.D

Kristy is a partner in RootWorks Communications (RootWorks.com) and president of SAS Communications 360 (SAScommunications360.com) — firms dedicated to providing practice management education, branding, marketing, and public relations services to the accounting profession. She is also a professor of English and marketing at University of Phoenix and Cleary University. You can reach her at kristy.short@cpapracticeadvisor.com.

If you'd like us to consider sharing your firm's story of innovation in a future issue, go to www.CPAPracticeAdvisor.com/great-practices and complete the short form. *We'd love to hear from you.*

REVIEW SECTIONS

BASIC SYSTEM FUNCTIONS

- General Navigation/Ease-of-Use
- Ease of Data Entry
- Multi-Users (concurrent)
- Client Management (on-screen management)
- SaaS or hosted version available?

REPORTING

- Electronic filing capabilities (Federal, States)
- Multi-state capabilities
- Billing capabilities
  - Integration with time & billing application?
  - Automated invoice creation?
- Forms supported
- Savable formats (PDFs, etc.)
- Pre-printed forms stock, blank paper?
- Stuff and mail service
- Overall client dashboard

IMPORT CAPABILITIES

- Import capabilities from major accounting systems
- Import capabilities from common file formats (CSV, Excel, XML, etc.)

HELP/SUPPORT

- Built-in support features
- System updates
- Support website/documentation
- Live support

SUMMARY & PRICING

See www.CPAPracticeAdvisor.com/10347311 for a review of 1099 Fire & W-2 Fire.

7 Things to Consider for Year-End Reporting

Last year at about this time, many small businesses and their accountants were worried about a part of the 2010 stimulus act that would have massively increased the 1099 reporting requirements. Fortunately, the part of the bill that required reporting of all amounts in consideration of property or "other gross proceeds" made in the course of trade or business was repealed.

Despite that change not going into effect, year-end wage and information reporting isn't always easy, nor are the reporting requirements static. Another recent factor is the temporary payroll tax deduction instituted for tax year 2011 (extension of this tax break was under discussion at the time of this writing). This measure reduced the 6.2% Social Security withholding rate to 4.2%. Hopefully, your clients were aware of this, but if not, their employees will be able to claim a credit on their 2011 1040.

These types of changes are less frequent, however, than procedural changes, such as the continual implementation of the e-file mandate. For federal reporting, it remains the same this year, requiring e-filing of W-2s and 1099s for entities preparing more than 250 such forms. Fortunately, the companies that make W-2 and 1099 preparation software have all finally recognized the need for e-filing and have made it a central component of their systems or offer it as a module.

Among other ongoing issues for those who manage the year-end compliance needs of multiple businesses is the processing of the actual forms. Even though e-filing of the federal copies of returns has become standard, recipient copies are still generally produced on paper. For some companies, this can mean hundreds or even thousands of forms to prepare, print and mail. And for professional firms with multiple clients, the output needs can swell dramatically. This has led to a return of service-bureau style offerings from several of the providers in this market. Through these services, the firm handles the processing, but all printing and mailing, including postage, is handled by the software publisher.

The most important factor, as with most professional systems, is ensuring that the programs can actually do the job you need them to do.

Here are seven things to consider:

1. E-filing is now offered by all of the programs for Federal forms. However, state e-filing capabilities vary based on the application.
2. Does the solution include all of the federal, state and local forms your clients need?
3. Can the application print to plain paper, or does it require preformatted paper?
4. Can users import data from various bookkeeping and payroll systems?
5. How many users can it support?
6. Are there limits on the total numbers of clients and recipients?
7. Does your firm want to manage client billing through the program?

These are all integral components to finding the W-2/1099 reporting system that best fits the needs of your clients and your firm, and we cover each of these topics and more in this year's review.

Isaac M. O'Bannon,
Technology Editor

Taxport A/P Automates 1099 Filings with SaaS System

Convey Compliance offers the only SaaS-based 1099 compliance system on the market in its Taxport A/P offering. The program is designed to integrate with the accounts payable module of a business' ERP or accounting system. This integration allows Taxport A/P to automatically prepare 1099s, and Convey then manages all compliance processes, including filing all federal copies, and printing and mailing all recipient copies. This fully managed 1099 service is especially valuable for mid-sized and larger enterprises with substantial quantities of 1099s, freeing their AP departments from these often tedious functions.

Designed for use by either the business or the practitioner, nearly all functions are automated. The system provides management and reporting overviews for users, and includes integrated tools that ensure accurate filings. The Smart Import feature, for instance, helps map source data from Excel and 1220 files to forms, and the Dashboard Monitoring system alerts users to tasks pending action, and also offers status updates. Taxport A/P includes real-time TIN validation, enabling users to identify invalid TIN/name combinations before filing.

Because it's a web-based system, all updates are automatically maintained by the vendor, which also reduces IT requirements. Businesses using Taxport A/P have reported significant decreases in B-notices, as well as the benefits of decreasing end-of-year staff workload.

888-303-1099 **www.convey.com**

IDMS, Inc. — Account Ability Tax Form Preparation

2011 OVERALL RATING ★★★★½

BEST FIT

Professionals with multiple mid- to large-sized clients managing year-end compliance and ATF payroll for multiple entities.

STRENGTHS

- Multiple data-entry views, management dashboards.
- Good managerial reporting options, output formats.
- Print & mail outsourced service.
- Strong Help utility & assistive features.
- Built-in document management with secure emailing.

POTENTIAL LIMITATIONS

- No built-in invoicing functionality.

SUMMARY & PRICING

Account Ability provides excellent built-in support for e-filing year-end wage and information returns, with features and tools that simplify management of multiple clients. The new FileCabinet system is a welcome addition, providing good storage and secure electronic delivery of forms. The company also offers a broad array of related print products. Account Ability is priced starting at $219.95 per year, with early order discounts available.

PRODUCT DELIVERY METHODS:

- ☑ On-Premises
- ☐ SaaS
- ☑ Hosted by Vendor

★★★★½	BASIC SYSTEM FUNCTIONS
★★★★½	REPORTING
★★★★	IMPORT/EXPORT CAPABILITIES
★★★★★	HELP/SUPPORT

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10347401

888-IDMS-inc (436-7462) **www.IDMSinc.com**

Advanced Micro Solutions — 1099-Etc

2011 OVERALL RATING ★★★★½

BEST FIT

Accounting practices performing after-the-fact payroll, quarterly and year-end information reporting for multiple clients.

STRENGTHS

- Excellent interface, client management screens.
- Extensive federal, state & local forms library along with e-filing.
- Option for outsourcing printing & mailing of all recipient copies.
- Imports from outside accounting & other programs via several formats.
- Comprehensive payroll functionality.

POTENTIAL LIMITATIONS

- No local reporting capabilities.

SUMMARY & PRICING

Although 1099-Etc can be used directly by small and mid-sized businesses, AMS has concentrated development of the system toward multi-client management functions, resulting in more than 80% of its users being accounting firms and payroll service providers. With the addition of the live payroll and electronic filing modules, the full AMS suite offers an extremely easy-to-use and affordably priced utility for managing employment, wage, and information reporting for federal and all states. The core 1099-Etc system costs $75 per year, but to get the full functionality, users should also add the $75 laser generation options, the $105 A-T-F payroll module and the $105 e-file utility. These options, usable by any number of staff in the same office, would cost $360 per year.

PRODUCT DELIVERY METHODS:

- ☑ On-Premises
- ☐ SaaS
- ☐ Hosted by Vendor

★★★★½	BASIC SYSTEM FUNCTIONS
★★★★½	REPORTING
★★★★½	IMPORT/EXPORT CAPABILITIES
★★★★★	HELP/SUPPORT

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10347464

800-536-1099 **www.1099-etc.com**

Only Need a Few W-2s or 1099s? WageFiling.com Offers Pay-As-You-Go Option

Small businesses are often the ones least prepared for the challenges of tax season, especially when they find out that it actually starts in January with preparation of last year's W-2s and 1099s. With good financial management and advice from a great accountant, they can be better prepared. But if they only have a few W-2s or 1099s to file, it might not make sense for them to buy and learn a program designed for preparing hundreds or more.

The WageFiling.com system is designed for these small businesses and household employers, making it easy to file any number of 1099 Misc and W-2 forms, on a per-form pricing model. It offers IRS-approved forms that can be printed on plain paper, and mailed with standard window envelopes, plus it includes free e-filing to the IRS and SSA. Users can also file for past years, and one account can manage multiple business entities. Forms can be accessed and reprinted, if necessary, or can be saved to PDF.

Wagefiling.com has a simple interface that guides users through the steps required for filing, and offers auto-calculation for FICA withholding. An alerts feature can also notify users of filing deadlines. The cost is $3.49 per form. No payment is required until ready to e-file and print forms, and previously filed ones are always accessible via the secure website.

361-884-1500 **www.wagefiling.com**

Tenenz — Laser Link

2011 OVERALL RATING ★★★★☆

BEST FIT

Small practices managing year-end compliance processes for multiple small businesses.

STRENGTHS

- Easy interface & data entry.
- Free e-filing.
- Good forms support.
- Inexpensive.

POTENTIAL LIMITATIONS

- Limited import options & does not export.
- No built-in invoicing functionality.
- Minimal online support, but live support is free.

SUMMARY & PRICING

Laser Link is best suited to small tax and accounting practices, providing an easy-to-use system for generating year-end returns for multiple clients and recipients. The program includes free e-filing and costs $59.99 per license. This supports all users in the same office and includes the ability to print to plain or pre-printed stock. The TFP system, which is also designed for multi-entity filing of W-2s and 1099s but only supports printing to pre-printed forms, costs $39.99. The online eFilefor-Business system, which includes built-in e-filing and which is designed for lower volume users, is offered on a per-use basis for as little as $0.95 per form to e-file to the government and mail to the recipient.

PRODUCT DELIVERY METHODS:

- ☑ On-Premises
- ☐ SaaS
- ☑ Hosted by Vendor

TEN·ENZ™

★★★★☆	BASIC SYSTEM FUNCTIONS
★★★★☆	REPORTING
★★★★	IMPORT/EXPORT CAPABILITIES
★★★★☆	HELP/SUPPORT

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10351079

800-888-5803 **www.tenenz.com**

Spokane Computer, Inc. — MAG-FILER

2011 OVERALL RATING ★★★★☆

BEST FIT

Practices seeking a simple system for managing multiple clients, with support for all federal and state year-end compliance requirements.

STRENGTHS

- Intuitive interface, client management screens.
- Import from Microsoft Excel, QuickBooks, Sage Peachtree & text files.
- Multiple file output options.
- Print/mail service bureau option.

POTENTIAL LIMITATIONS

- No support for 940 series reporting.
- Lacks a client billing system.

SUMMARY & PRICING

MAG-FILER is a very easy-to-learn system for preparing year-end returns, and provides good built-in e-filing capabilities to the IRS, SSA and most states. The company's printing and mailing service can provide relief for preparers who wish to minimize time spent on these tasks. MAG-FILER costs $364 if ordered on disc, but is discounted to $324 if downloaded online.

PRODUCT DELIVERY METHODS:

- ☑ On-Premises
- ☐ SaaS
- ☑ Hosted by Vendor

MAG-FILER

★★★★	BASIC SYSTEM FUNCTIONS
★★★★☆	REPORTING
★★★★	IMPORT/EXPORT CAPABILITIES
★★★★☆	HELP/SUPPORT

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10347387

866-440-5471 **www.SpokaneComputer.com**

CCH Small Firm Services — ATX & TaxWise Payroll Compliance Reporting

2011 OVERALL RATING ★★★★½

BEST FIT

Small and mid-sized tax and accounting practices seeking to broaden their client services by offering year-end compliance, particularly those using solutions from CCH Small Firm Services for tax preparation and write-up.

STRENGTHS

- Integration with professional tax package.
- Strong federal & state support, including e-filing.
- Library of more than 500 local & 1,200 misc state forms.
- Good client management views & oversight.
- Excellent support & training options.

POTENTIAL LIMITATIONS

- Client invoicing is through tax package.

SUMMARY & PRICING

Payroll Compliance Reporting is best designed for small and mid-sized firms that want to add year-end information reporting to their client services. It can also be used as a stand-alone product. The system integrates well with the vendor's ATX tax software and offers import from QuickBooks and Sage Peachtree. It also offers comprehensive forms support at the federal and state levels with e-filing included. Payroll Compliance Reporting costs $349 per year.

PRODUCT DELIVERY METHODS:

- ☑ On-Premises
- ☐ SaaS
- ☑ Hosted by Vendor

CCH Small Firm Services
a Wolters Kluwer business

★★★★☆	BASIC SYSTEM FUNCTIONS
★★★★☆	REPORTING
★★★★☆	IMPORT/EXPORT CAPABILITIES
★★★★★	HELP/SUPPORT

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10360777

800-375-9542 **www.ATXinc.com / www.TaxWise.com**

AccountantsWorld — After-the-Fact Payroll

2011 OVERALL RATING ★★★★½

BEST FIT
Firms managing year-end compliance and ATF payroll for multiple entities.

STRENGTHS
- Strong multi-client views, dashboards.
- Web-based system provides remote access.
- Integration with larger web-based suite.
- Comprehensive forms support.
- Electronic filing of federal and state quarterly forms, W-2 and 1099.

POTENTIAL LIMITATIONS
- No built-in invoicing functionality, but offers integration with other systems.

SUMMARY & PRICING
After-the-Fact Payroll is the most fully featured web-based year-end compliance system covered here, providing excellent multi-user functionality and integration with client collaboration tools and document management systems. After-the-Fact Payroll costs $395 per year, inclusive of all features and e-filing. It is also available as a component of the Power Practice System, and functions best with this broader web-based suite of eight integrated professional accounting and practice management solutions.

PRODUCT DELIVERY METHODS:
- ☐ On-Premises
- ☑ SaaS
- ☐ Hosted by Vendor

AccountantsWorld Do More. Do Better.™

- ★★★★★ BASIC SYSTEM FUNCTIONS
- ★★★★☆ REPORTING
- ★★★★☆ IMPORT/EXPORT CAPABILITIES
- ★★★★★ HELP/SUPPORT

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10347347

866-999-1366 www.AccountantsWorld.com

FormMagic, Inc. — Tax-Mate 1099

2011 OVERALL RATING ★★★★½

BEST FIT
Accounting firms with large client bases, with varied import/integration needs.

STRENGTHS
- Strong multi-client management tools.
- Multi-user level security.
- Multiple data-entry options.
- Built-in diagnostics.

POTENTIAL LIMITATIONS
- Limited local forms.
- Lacks client billing/invoicing center.

SUMMARY & PRICING
Tax-Mate provides a comprehensive 1099 and W-2 solution, with strong multi-client management tools and overviews, as well as batch printing options that can streamline forms generation. It includes unlimited e-filing for federal and all states through the federal agency piggyback process, but does not offer separate forms for state and local reporting. The well-designed interface offers multiple data-entry options and is easy to learn and use. Tax-Mate 1099 Advisor costs $299 per year for any number of in-firm users. Versions of the system for users with less complex needs start at $95.

PRODUCT DELIVERY METHODS:
- ☑ On-Premises
- ☐ SaaS
- ☐ Hosted by Vendor

Tax-Mate 1099

- ★★★★★ BASIC SYSTEM FUNCTIONS
- ★★★★☆ REPORTING
- ★★★★☆ IMPORT/EXPORT CAPABILITIES
- ★★★★☆ HELP/SUPPORT

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10346651

888-746-0440 www.FormMagic.com

American Riviera Software Corp. — Magtax Professional

2011 OVERALL RATING ★★★★½

BEST FIT
Firms managing year-end compliance for multiple businesses, with built-in electronic filing for federal and supported states.

STRENGTHS
- Comprehensive forms, reporting capabilities.
- Output to various file formats.
- Excellent QuickBooks integration.
- Strong Help utility/assistive features.

POTENTIAL LIMITATIONS
- No built-in invoicing functionality.
- Does not provide 940-series forms.

SUMMARY & PRICING
Magtax has strong, two-way integration with QuickBooks that enables users to easily pass data between the systems, including assigning of GL accounts to each recipient. Electronic filing is included, and the program provides a comprehensive collection of the most commonly used year-end forms. Pricing for the Professional version is $299 per year, with renewals costing $150, including all e-filing, laser printing and other features. The Standard version is $199, with renewals costing $100.

PRODUCT DELIVERY METHODS:
- ☑ On-Premises
- ☐ SaaS
- ☑ Hosted by Vendor

- ★★★★★ BASIC SYSTEM FUNCTIONS
- ★★★★☆ REPORTING
- ★★★★☆ IMPORT/EXPORT CAPABILITIES
- ★★★★★ HELP/SUPPORT

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10347323

805-504-1366 www.magtax.com

EG Systems, Inc. — The W-2/1099 Filer

2011 OVERALL RATING ★★★★½

BEST FIT

Professional practices with large client rosters for whom they provide year-end reporting.

STRENGTHS

- Excellent multi-client management functionality.
- Comprehensive state, federal & local form support.
- Multiple batch filing & printing options.
- Good integration capabilities.
- Barcoding of W-2s & SSN masking.
- Automated, free web-based data backup.

POTENTIAL LIMITATIONS

- No built-in client billing utility.

SUMMARY & PRICING

The W-2/1099 Filer system has broad compliance capabilities that extend to all 1099, 1098 and W-2 needs, along with 940, 941 and 943 filing, and free integrated e-filing to federal and all states. It offers great customization options and form output capabilities, including document storage and PDF generation, and the new web-based backup utility is an excellent addition. The program is comprised of various modules, starting at $109 for the base package, plus $40 for a laser engine that supports most common forms and allows for plain-paper printing. Non-common laser forms are $10 each, and the Payroll bundle (940/941/943) is $10. The QuickBooks import utility is $35, and the universal import function for importing from legacy applications is an additional $25. An all-inclusive package, then, is priced at $209 per year. Renewal customers receive reduced pricing.

PRODUCT DELIVERY METHODS:

- ☑ On-Premises
- ☐ SaaS
- ☑ Hosted by Vendor

EG Systems Inc.

★★★★★	BASIC SYSTEM FUNCTIONS
★★★★★	REPORTING
★★★★½	IMPORT/EXPORT CAPABILITIES
★★★★★	HELP/SUPPORT

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10351297

800-264-3155 **www.W21099.com**

Is the Virtual Practice Model Right for Your Firm?

Isaac M. O'Bannon,
Technology Editor

Isaac is the Technology Editor for CPA Practice Advisor, having joined the publication in September 2002. Through his experience in the areas of consumer and professional-level software and peripherals, as well as knowledge of the public accounting field, he provides reviews of technologies used by accountants and their business clients as well as contributing a regular column that provides helpful information that ranges from improving search techniques, when to upgrade a computer and computing security issues. He can be reached at isaac.obannon@cpapracticeadvisor.com.

When we first started writing about web-based programs about 10 years ago, the focus frequently centered on the key benefits of anywhere/anytime access to client and firm data and the enhanced security of data stored in online systems.

Yes, this data is safer "in the cloud" than on a computer or server in your office, which is at risk of physical damage, fire, theft, flooding or a variety of other disasters. You also have the added comfort of redundant servers, where major technology service providers automatically keep backups at separate physical locations.

As the years have progressed, mobility has certainly proven anything but a fad or a convenient add-on to practice workflows. And over the past five years, with the advent and mass adoption of smartphones and remote apps, the mobility movement has shown itself to be a powerful force in reshaping the very structure and workflow of modern practices.

Many practices have realized the benefit of remote workers, particularly with being able to recruit and retain talent. For an increasing number of tax and accounting professionals, however, this total mobility has even resulted in the dissolution of "the office" as it has long been understood. While the profession has had remote workers for years, the fairly recent ability to truly have the same workplace capabilities from home, the airport, a coffee shop or even a faraway beach, has led some business management to rethink the need for walls and a physical business address at all.

MOST OF THE TANGIBLE BENEFITS TO GOING TRULY VIRTUAL ARE REALIZED BY SMALL FIRMS AND SOLE PRACTITIONERS THAT HAVE ALREADY STARTED TO ADOPT WEB-BASED PROGRAMS.

Why would a firm go virtual?

There are obvious financial incentives to ditching or reducing the amount of space in a physical office, starting with the cost of rent or the mortgage. However, many practitioners consider the equity and eventual ownership of a building to be part of their retirement exit strategy, as it is an asset that can eventually be sold. Firms will also realize a savings on utilities and maintenance costs.

However, most of the tangible benefits to going truly virtual are realized by small firms and sole practitioners that have already started to adopt web-based programs. This decrease in overhead can also make it much easier to start a new firm. For larger practices, the potential savings are not as significant, and personnel management issues can be more difficult.

Other benefits include the ability to easily hire or contract with professionals who are located anywhere across the country.

Virtual isn't for everyone

I noted that going completely virtual may not be as desirable or carry the same benefits for larger practices, although some have found success in such a move, such as Accounting Department.com, which has a staff of more than 40 full-time employees dispersed across the United States. But there are many other reasons that going virtual might not be a good move, starting with client needs.

Think about your firm and how often your clients actually come into your office. If it is a somewhat rare event, then perhaps you could go virtual, meeting with clients at their businesses, at a shared office space, or by video or phone conference. But if you have more of a retail practice that relies on frequent client visits or walk-ins, then it's probably not for you.

Some people desire the structure and organization that a traditional office instills, and some worry that they may be too easily distracted in a home office setting. And there are those who consider the idea just completely ludicrous. For these individuals, "the office is the office," and it shall not be mingled with a home office.

The hybrid alternative

Many very small firms and sole practitioners are experimenting with maintaining an office, but using it about as often as they work from other locations. This allows the solidity of a physical presence, while being almost as flexible as a totally virtual firm. Some professionals I've profiled in our Productivity in Practice series who operate this way include CPAs Michael Hsu, Kara Haas, Chad Bordeaux, Elizabeth Davis and William Miranda.

And even in practices with 15 to 20 staff, there's a successful variation on this option. At this level, there are undoubtedly some professionals who are more production-focused, who rarely, if ever, meet with clients, and who are already doing most of their work collaboration with other staff via electronic means, such as email and portals. If half of such a firm's staff were encouraged to work from a home office, it would allow the practice to downsize its physical office footprint.

The virtual office may not be everywhere yet, but it is here. For those who embrace it, there are numerous benefits, but it's not for every firm or for every client base. Ecommerce revolutionized many aspects in the retail space, but it did not eliminate the need for the brick and mortar business. And the physical tax and accounting office won't disappear anytime soon. SaaS-inclined, on-the-go professionals simply have another option. ●

REVIEW SECTIONS

BASIC SYSTEM FUNCTIONS
- General navigation/ease-of-use
- Designed for accounting professionals
- Scalability
- Hosted version/SaaS app

TIME MANAGEMENT CAPABILITIES
- Timesheets, timers, multi-staff views
- Multi-staff entry
- Time tracking by project/job
- Approvals/sign-off process
- Support for various hourly rates

INVOICING FUNCTIONS
- Expense tracking options
- WIPs, budget-from-estimate
- Accounting interface cash or accrual
- AR management
- Customization

MANAGEMENT FEATURES
- Dashboard overviews (aka snapshots)
- Managerial reporting analysis
- Security features/user roles

INTEGRATION & DATA MANAGEMENT
- Data output options
- Integration w/payroll & professional accounting systems
- Report writer or customization tool
- Integration w/other apps (tax software, e-marketing, portals)

HELP/SUPPORT
- Built-in support features
- System updates
- Support website/documentation
- Live support

SUMMARY & PRICING

Time is Money:
9 Products to Help Improve Your Revenue Stream

Among the many words of wisdom attributed to American statesman Benjamin Franklin is the famous quote, "Remember that time is money." This advice was given in the context of avoiding idleness (and therefore wasting money), but if Franklin were alive today, I'd be willing to wager a bill bearing his image that his recommendation to accounting firms would be to invest in a good time and billing software. Effective use and management of these systems literally turns time into money, provided that clients pay their bills.

Benjamin Franklin also said, "Lost time is never found again." The Excel spreadsheet, handwritten ledger, and the jog-my-memory (what did I do today?) methods of timekeeping often result in billable time disappearing into the black hole of lost hours, never to be seen or heard of again. With the constant interruptions that multitasking accountants face every working day, precious minutes can be rescued from permanent oblivion with a strong time and billing system, armed with stopwatch-like timers that accurately and automatically convert recorded time into invoices.

Many firms do not bill by the hour for all tasks, instead using fixed-fee arrangements, value pricing or a combination of methods. Regardless of a firm's billing strategy, tracking time is widely considered to be an important practice for measuring costs and profitability for specific clients and engagements.

In recent years, invoicing has evolved in time and billing systems to give firms extensive customization options for the layout, text and colors of invoices.

By taking advantage of these features with a little creativity, invoices can be used as a branding and advertising mechanism instead of just a collection tool. Many of the leading time and billing software packages provide multiple delivery methods, including PDF attachments to e-mails and a medium by which to pay by credit card or PayPal, satisfying many of the growing younger generation of clients who prefer to pay electronically. With web-based programs, accountants can even enter time and produce invoices while at clients' offices, increasing the likelihood of being paid in world record-breaking time.

Capturing and disseminating accurate and detailed information in time and billing software is essential for effective reporting. Management can make more informed decisions with real-time data showing the profitability of services, clients and staff.

The websites for each of the time and billing systems reviewed here include sections with customer testimonials. After reading several of them and speaking to many practitioners, it is evident that successful implementation of a time and billing software improves a firm's operations and revenue stream. A few satisfied customers reported that software significantly decreased the amount of time spent on billing activities. Firm owners and managers can reallocate this recaptured time to something billable instead, resulting in the time and billing system paying for itself. Indeed, Benjamin Franklin was right: Time *is* money.

Not included in this year's review of time and billing systems is Intuit ProLine Practice Management, which is currently in pilot testing. This web-based integrated application synchronizes client data across Lacerte and QuickBooks, enabling firms to effectively manage client contacts, engagements, reporting, time tracking and billing. Additional information about Intuit ProLine Practice Management is available at http://www.prolinepracticemanagement.com.

By Dustin Wheeler

BQE Software Inc. — BillQuick

2011 OVERALL RATING ★★★★★


★★★★★	BASIC SYSTEM FUNCTIONS
★★★★★	TIME MANAGEMENT CAPABILITIES
★★★★★	INVOICING FUNCTIONS
★★★★★	MANAGEMENT FEATURES
★★★★★	INTEGRATION & DATA MANAGEMENT
★★★★★	HELP/SUPPORT

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10346566

BEST FIRM FIT
Small and mid-sized firms.

STRENGTHS
- Feature-rich SaaS version available, which can synchronize automatically with the desktop product.
- Native iPhone & Android apps.
- Free Lite version available.
- Tracks personal time off hours & approvals.
- The most extensive integration options with accounting software among products reviewed.
- Strong technical support & online resources.

POTENTIAL LIMITATIONS
- With so many options, users may have to do extra work on the front end to learn the product & adjust settings as preferred.

SUMMARY & PRICING
Because of its sleek design, ease of use and powerful integration with accounting programs, BillQuick is an excellent time and billing program for small and mid-sized firms. The base price for the two-user Basic edition is $495, with additional licenses offered at $145. The Pro edition comes with five licenses and costs $1,295; additional licenses may be added for $125 each.

PRODUCT DELIVERY METHODS:
- ☑ On-Premises
- ☑ SaaS
- ☐ Hosted by Vendor

855-687-1024 www.BillQuick.com

ImagineTime, Inc. — ImagineTime Practice Management

2011 OVERALL RATING ★★★★☆


★★★★½	BASIC SYSTEM FUNCTIONS
★★★★½	TIME MANAGEMENT CAPABILITIES
★★★★	INVOICING FUNCTIONS
★★★★	MANAGEMENT FEATURES
★★★★	INTEGRATION & DATA MANAGEMENT
★★★★★	HELP/SUPPORT

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10346548

BEST FIRM FIT
Small firms, especially those taking advantage of the tax software integration available.

STRENGTHS
- Ribbon interface similar to Microsoft Office.
- Integration with tax software & QuickBooks.
- Synchronization with Outlook, including viewing staff calendars side-by-side.

POTENTIAL LIMITATIONS
- No SaaS version.

SUMMARY & PRICING
ImagineTime is a time and billing system best suited for small accounting firms, and when integrated with its offering of add-on modules, it becomes a powerful comprehensive practice management system. Pricing is based on the number of concurrent users, and starts at $295 for the stand-alone single-user version. The add-on modules, including due date tracker, Outlook synchronization, document management, QuickBooks and tax software integration are available individually with optional one-time charges.

PRODUCT DELIVERY METHODS:
- ☑ On-Premises
- ☐ SaaS
- ☑ Hosted by Vendor

877-520-1525 www.imaginetime.com

Abak Software — Abak Time & Billing

2011 OVERALL RATING ★★★★

★★★	BASIC SYSTEM FUNCTIONS
★★★★½	TIME MANAGEMENT CAPABILITIES
★★★★	INVOICING FUNCTIONS
★★★★★	MANAGEMENT FEATURES
★★★★	INTEGRATION & DATA MANAGEMENT
★★★★	HELP/SUPPORT

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10346447

BEST FIRM FIT
Small and mid-sized accounting firms, especially those integrating with certain accounting software (Sage Simply Accounting, Sage Accpac ERP, Avantage and Acomba).

STRENGTHS
- Three-level approval system for time & expenses.
- Web-based interface for a few of the program's functions.

POTENTIAL LIMITATIONS
- Help file is difficult to navigate, and online resources are not as strong as its competitors.

SUMMARY & PRICING
Abak should be considered among small and mid-sized accounting firms that need multi-level approval of time and expenses as well as integration with certain accounting systems. The base price is $120 per year per user. The additional cost for Abak to integrate with an accounting system is $13.20 per year per employee. Remote time entry is also available for additional fees.

PRODUCT DELIVERY METHODS:
- ☑ On-Premises
- ☐ SaaS
- ☐ Hosted by Vendor

888-849-8059 www.abaksoftware.com

Chrometa

2011 OVERALL RATING ★★★★½

BEST FIRM FIT

Small firms with simple billing needs, or firms of any size for timekeeping.

STRENGTHS

- Innovative system for automatically tracking time.
- Integration with several accounting programs and other billing programs.
- SaaS software that can aggregate time from multiple PCs.

POTENTIAL LIMITATIONS

- Limited invoicing capabilities. Works best with an integrated application for these functions.
- No current application for tracking time on mobile devices.

SUMMARY & PRICING

As a standalone product, Chrometa is a good fit for small tax and accounting firms that need an advanced web-based timekeeping system but have simple billing needs. For firms of any size, it works well as a timekeeping component used in conjunction with another accounting or time and billing system, especially for users who struggle to use timers and hate filling out timesheets. The basic plan is $19 per month. With advanced exporting features, the basic plus and premium plans are $29 and $49 per month, respectively.

PRODUCT DELIVERY METHODS:

- ☑ On-Premises
- ☑ SaaS
- ☐ Hosted by Vendor

★★★★★	BASIC SYSTEM FUNCTIONS
★★★★★	TIME MANAGEMENT CAPABILITIES
★★★★	INVOICING FUNCTIONS
★★★☆	MANAGEMENT FEATURES
★★★★★	INTEGRATION & DATA MANAGEMENT
★★★★★	HELP/SUPPORT

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10346533

888-340-6425 www.Chrometa.com

Tenrox — Timesheet.com

2011 OVERALL RATING ★★★★★

BEST FIRM FIT
Medium-sized and large firms.

STRENGTHS
- Interface & many aspects of the program are very customizable.
- Great user & project management capabilities.
- Best management dashboards among products reviewed.
- Tracks accrued vacation & sick days.
- Integration with many accounting & payroll products, the most comprehensive among products reviewed.

POTENTIAL LIMITATIONS
- Very small firms may not be able to take advantage of all the management & reporting features offered.
- May take time to properly set up & customize, though it will result in time savings later on.

SUMMARY & PRICING
Timesheet.com by Tenrox is well suited for medium-sized and large accounting firms. Tenrox's target market for its Express edition is firms with 10 to 30 users. And being a very scalable product, some of the vendor's customers have thousands of users. Each named user requires a license, and rates start at $10 per user per month. Discounts are available based on the number of modules purchased, commitments and other terms.

PRODUCT DELIVERY METHODS:
- ☑ On-Premises
- ☑ SaaS
- ☐ Hosted by Vendor

★★★★★	BASIC SYSTEM FUNCTIONS
★★★★★	TIME MANAGEMENT CAPABILITIES
★★★★½	INVOICING FUNCTIONS
★★★★★	MANAGEMENT FEATURES
★★★★★	INTEGRATION & DATA MANAGEMENT
★★★★★	HELP/SUPPORT

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10346605

877-4-TENROX **www.tenrox.com**

Sage North America — Sage Timeslips 2012

2011 OVERALL RATING ★★★★½

BEST FIRM FIT
Small and mid-sized firms.

STRENGTHS
- Timeslips eCenter allows users to enter time & expenses remotely.
- Timeslips Today dashboard view provides helpful information & is customizable.
- Integration with accounting software, including Sage Peachtree and QuickBooks.

POTENTIAL LIMITATIONS
- Does not support HR tracking, such as personal time off.

SUMMARY & PRICING
Sage Timeslips has defined its target market as any business that bills for its time, including sole practitioners and small to medium-sized service firms with multiple timekeepers. The single-user version is $499.99, and additional users may be added for $249.99 each.

PRODUCT DELIVERY METHODS:
- ☑ On-Premises
- ☑ SaaS
- ☑ Hosted by Vendor

★★★★½	BASIC SYSTEM FUNCTIONS
★★★★★	TIME MANAGEMENT CAPABILITIES
★★★★★	INVOICING FUNCTIONS
★★★★★	MANAGEMENT FEATURES
★★★★★	INTEGRATION & DATA MANAGEMENT
★★★★½	HELP/SUPPORT

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10346593

800-285-0999 **www.sagetimeslips.com**

AccountantsWorld — Practice Relief

2011 OVERALL RATING ★★★★☆

BEST FIRM FIT
Small firms using the AccountantsWorld Power Practice System.

STRENGTHS
- Intuitive, easy to set up & begin using.
- Integration with other products in the AccountantsWorld suite.
- E-mail broadcast for client communications, with tools to group clients for e-mails & track which e-mails were sent to clients.

POTENTIAL LIMITATIONS
- Limited invoice customization options.
- Security settings can be set to restrict users' access to the major functions, but does not go into detail like other programs.

SUMMARY & PRICING
Practice Relief is best suited for bookkeepers and accounting firms using the AccountantsWorld Power Practice suite. Firms not using the suite may consider Practice Relief as a standalone product because of its simplicity, ease of use and short learning curve. Pricing is $395 per year or $40 a month for an unlimited number of users.

PRODUCT DELIVERY METHODS:
- ☐ On-Premises
- ☑ SaaS
- ☐ Hosted by Vendor

★★★★★	BASIC SYSTEM FUNCTIONS
★★★★½	TIME MANAGEMENT CAPABILITIES
★★★★½	INVOICING FUNCTIONS
★★★★	MANAGEMENT FEATURES
★★★½	INTEGRATION & DATA MANAGEMENT
★★★★	HELP/SUPPORT

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10346589

888-999-1366 **www.accountantsworld.com**

Broadway Billing Systems — Bill4Time

2011 OVERALL RATING ★★★★½

BEST FIRM FIT

Small and mid-sized firms wanting to do all time and billing in the cloud.

STRENGTHS

- Many options for capturing time, including a desktop widget & mobile apps.
- Easy integration with PayPal for collecting online payments.
- Scheduling integration with Outlook, Google Calendar & iCal.
- Billing rate flexibility for specific clients, projects, activities & time entries.

POTENTIAL LIMITATIONS

- Limited customization of invoices & reports within the program, though Bill4Time designs customized templates at no charge.

SUMMARY & PRICING

Bill4Time is an excellent choice for small to mid-sized accounting firms that want to do their time and billing completely with a web-based program, especially those that will take advantage of the mobile application and PayPal integration. Bill4Time has a free version for one user with up to three clients and five projects. The Lite version goes up to 20 clients and 30 projects at $19.99 per month and $9.99 for additional users. The Pro plan, at $39.99 per month and $19.99 for additional users, allows for unlimited clients and projects. Volume discounts are available for large companies.

PRODUCT DELIVERY METHODS:

- ☐ On-Premises
- ☑ SaaS
- ☐ Hosted by Vendor

★★★★☆	BASIC SYSTEM FUNCTIONS
★★★★½	TIME MANAGEMENT CAPABILITIES
★★★★☆	INVOICING FUNCTIONS
★★★★☆	MANAGEMENT FEATURES
★★★★	INTEGRATION & DATA MANAGEMENT
★★★★★	HELP/SUPPORT

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10346580

877-245-5484 www.Bill4Time.com

TPS Software Inc — TPS Time & Billing

2011 OVERALL RATING ★★★★½

BEST FIRM FIT

Small and mid-size firms using Microsoft Office.

STRENGTHS

- Most complete integration with Microsoft Office among products reviewed, allowing for maximum customization of invoices & reports.
- Unique to the other products reviewed, the time entry screen includes a graphical timeline showing how a day's time was spent.
- Solid integration with QuickBooks.

POTENTIAL LIMITATIONS

- No SaaS version or interface available.
- Not as many online resources to learn about the product as its competitors, but it does have good built-in Help.

SUMMARY & PRICING

TPS Time and Billing may not have the outward appearance of a sports car with its older design elements, but it has a lot of power under the hood. This is a good fit for a small to mid-size firms with up to 60 employees using Microsoft Office and seeking strong security and reporting capabilities. The one-time license fee is $399 for the first user plus $149 for each additional user actively tracking time. This price includes technical support, updates and online user training for 60 days.

PRODUCT DELIVERY METHODS:

- ☑ On-Premises
- ☐ SaaS
- ☐ Hosted by Vendor

★★★★	BASIC SYSTEM FUNCTIONS
★★★★☆	TIME MANAGEMENT CAPABILITIES
★★★★★	INVOICING FUNCTIONS
★★★★★	MANAGEMENT FEATURES
★★★★★	INTEGRATION & DATA MANAGEMENT
★★★½	HELP/SUPPORT

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10346600

888-877-2231 www.tpssoftware.com

5 Steps for Marketing Your Firm

Many tax and accounting professionals struggle to find the best way to leverage limited marketing resources to effectively position their firm in the marketplace. And the advent of social media, online networking and other digital strategies has further expanded the field of marketing activities for firms. For many firms, this adds to the confusion about the best way to invest already limited marketing resources. In many cases, firm partners and managers are not experienced marketers and are unsure how to best develop, implement, monitor and improve firm-wide marketing efforts.

1 Recognize Your Marketing Responsibility

Most small accounting firms do not have dedicated marketing professionals. This means that all marketing activities from strategy to collateral and copy development are the responsibility of partners or a marketing-minded staff professional.

Michael Tepastte, a partner at Wilber & Townshend, a 12-professional CPA firm located in Jenison, Mich., is all too familiar with this scenario. "Given our size, we do not have any dedicated staff for marketing," he said. "Responsibility for marketing begins with each partner and is carried out by the entire team."

Limited by time, resources and skill set, many firms look outside their offices for help. "Our firm outsources the marketing function," said Marty McCutchen, CPA and partner at CPA Service Group, a three-professional firm located in Dallas, Texas. "The partners assume responsibility for managing the outsourced marketing function and ensure our efforts are producing results over the long term."

2 Establish an Effective Strategy

Regardless of whether marketing services are delivered in-house or from an outsourced provider, an effective marketing program begins with establishing a strategy that allows a firm to meet its defined objectives. Once a strategy has been developed and agreed upon, it is essential to stick with it, or make a decision as a group to shift based on trends or other observations about opportunities in the marketplace. A common mistake many firms make is to take the "shotgun approach." This is characterized by a quick decision to initiate a marketing program with little thought about expense, the drain on internal resources, or what is expected to come from the program. Unfortunately, with inadequate oversight and involvement from management, the results may be less than optimal.

"Marketing initiatives are led by the partners based on the strategic plan with input from observations of change in the market and networking partners," said Tepastte. "Partners and professionals do the work of planning, research and defining ROI for each initiative. Support staff is involved with creating the final product whether it is an internal effort or working with a network partner."

CPA Service Group takes a different, but no less effective approach. "We do not have a formal written approach per se," said McCutchen. "However, I do plan out in advance what programs we want to implement and have a clearly defined understanding of what the firm expects to accomplish in terms of ROI and other metrics prior to launch."

3 Set a Reasonable Budget

Equally as important to a well-defined strategy is an adequate budget. A firm needs to set a marketing budget that will allow marketing goals to be accomplished. While every firm has a different formula for determining a budget amount, the general rule is 2% to 4% of projected firm revenues. It is important to note that this figure should not include internal labor costs allocated to marketing. Most firms use the marketing budget to cover the cost of activities or tactics designed to market the practice. Some examples include sponsorships, association dues, advertising expenses (traditional and digital), website development, collateral development and newsletters. The key to developing a strong and consistent marketing program is to not only have a strategic plan, but also a budget that will allow you to accomplish defined objectives.

4 Take a Consistent Approach

Marketing an accounting practice is not an easy task. Strong efforts must be made to ensure the firm is getting the proper exposure to prospects, clients and referral partners, not to mention juggling this with the client service responsibilities each professional must maintain. A key mistake many firms make is to be inconsistent in their marketing activities. It is very common for small practices to stop marketing during tax season and other busy times. Why? Because it is very easy to lose track of marketing activities when there are paying clients waiting for deliverables. Unfortunately, inconsistency in marketing can often reduce effectiveness and adversely impact ROI.

"Your marketing plan must be consistent and monitored on an ongoing basis," said McCutchen. Although it is tempting, especially during the busy season, it is important not to turn your marketing efforts on and off. You will not get the results you want and may end up feeling frustrated by the outcome."

Tepastte agrees: "It is difficult to be successful in marketing if you are inconsistent with your approach. While our firm may be busy that does not mean marketing should be put on hold. Yes, it can be challenging to maintain client service responsibilities and conduct marketing during the busy times, but ultimately having a consistent approach will lead to much more desirable results in the long run."

5 Keep Things in Perspective

In creating and executing your marketing program, it is important to remember that every accounting firm is different. Sales and marketing skills vary from partner to partner, and from manager to manager. One firm may have a key rainmaker that provides work for others in the practice, while another firm may have several marketing-minded professionals that drive marketing efforts. Regardless, you need to administer your marketing activities by the specific time, place and circumstance of your practice and the market you serve. Marketing is not "one size fits all," so trust your instincts and take advantage of the best practices outlined here.

By Brian Swanson

Mr. Swanson is a Principal with Flashpoint Marketing, a marketing and lead generation company focused on serving the accounting profession. He is certified by the Search Engine Marketing Professionals Organization in Internet Marketing and as an Advanced SEO Specialist. His firm focuses on providing traditional and digital media marketing and lead generation services exclusively for the accounting profession. Brian can be contacted at 888-428-6524 or via email at bswanson@flashpointmarketing.biz.

Websites: Your New Front Door

Most of us have built our businesses based on relationships. Some have built a reputation around a specific expertise. Others have built a business based on service levels. All of these strategies are still extremely important, but an increasingly important factor in the last 15 years is being found on the web. Many of us are not trying to build a national business, but as new, younger clients look for services, they are often turning online. Potential clients with more specific needs are also using Internet search to find new sources of expertise.

There are clear factors that make certain web presences stand out more than others: design, readability, ease of navigation, ability to be found by search engines, localization including local search, and the ability to run in different browsers on different devices. Your website should support your business model, and that may well include portal capability, integration of online accounting, news feeds and content that you produce yourself through social media. If you have a relatively static "yellow page" website that merely lists team members and services, you are highly unlikely to attract new business to the firm. That approach is "so" last decade.

Before I explain the options available, I'd like you to consider your website as it stands today. Would you be pleased and honored to have unknown guests visit your site? Does it represent the quality and values of your firm? Is your site understandable? To test this, ask your family members, friends or non-employee associates to evaluate your site with you. Although this is clearly an amateur approach, it will give you an immediate sense about the issues with your site. Consider your goals for the firm's website. Are these clearly communicated and accomplished? What do you want the website to do for your firm? If your current website is accomplishing everything you want it to, well, excellent for you! If not, you are now ready for a conversation with a website professional.

IF YOU HAVE A MARGINAL WEBSITE, OUTSIDERS WILL PERCEIVE THAT YOUR SERVICES ARE MARGINAL, TOO.

You can acquire or build websites multiple ways, but there are three methods that dominate. The first is to obtain a site from a provider that has canned content and templates, usually for a small upfront fee and a relatively low recurring monthly expense. Most tax and accounting firms take this approach since it carries the least expense. Examples of this approach include CCH Site Builder, Thomson Reuters Web Builder CS, Build Your Firm, Emochila, CPASiteSolutions, CPAsites, etc. (see page 27 for more information on these tools).

The second method involves greater risk and expense. This is where expertise is sought out, sometimes locally and sometimes from a national or international resource. These sites are often built based on a local referral, and the hope is that you get a customized site with a unique look and feel. The issue with this method is that when the website programming resource becomes disinterested or unavailable, you may have to rebuild your entire site. Sometimes the programmers of custom sites can commit to other projects and become unavailable for maintenance or updates.

The third method involves a hybrid of the two other approaches, where professional design and marketing is used on a site and content updated inside these wireframes or designs. Sites built with this technique are cleaner with clearer messaging than the template sites using canned content. Examples of these types of sites include the work being done by the RootWorks team or by Network Management Group, Inc.'s WebCare team.

Here are a few technical design principles that all sites should follow.

1) Never host your website in-house. The security risk is too high.
2) Use a content management system, such as Joomla.
3) Make a significant part of your website visible "above the fold" (not requiring visitors to scroll down).
4) Include social media integration using YouTube video feeds, RSS feeds, Twitter, Facebook, etc.
5) Make your website usable on mobile devices.
6) Build your website so it follows search engine optimization (SEO) rules, although they change over time.

Search engines view the following:

- B domain name
- C page title (with 14 words in the title currently best)
- D headlines
- E first paragraph content
- F hidden site description (should contain between 25 and 100 words)
- G remaining visible content
- H links between other sites
- I hidden keywords

Your content management system may help with some of these items, but your website builder's thoughtful design can make a noticeable difference in your organic or unmanipulated search engine results. Including items like the cities where you operate, key areas of expertise, and other keywords to help people find you and your site can make a big difference, but you can do better.

All sites need SEO. The tips in the pullout above are a start, but the steps to do optimization right takes an SEO professional's touch, some thoughtful setup and guidance from you, and hours (two to 30) of work each month. The heart of SEO is keywords. It generally takes about 40 hours to properly develop a keyword list and get these keywords into the code portion of the website. Then, the keywords need to be used in the text on each page of the site.

This is where SEO starts … not ends, as many people think. The goal is that you appear on the first page of the major search engines when using the search terms that potential clients use to find you. It's not an exact science because the engines don't divulge why they rank things the way they do. Through a community that thrives on testing theories, there have been tried-and-true methods that are known to increase rankings. Often, these discoveries lead to spammers exploiting it, and then the engines respond by adjusting their algorithm. A focus on the end user experience (providing fresh, relevant content in a quick and easy manner) will lead to the best long-term results, not "chasing the algorithm." See page 22 for some basic SEO tips.

Since the majority of all web visits start at a search engine, it is important to ensure that a search strategy is included in the overall website design process. Simple design or programming decisions can have a significant impact on rankings and can remove from search engines entirely. The trick is to understand how people look for you to select the right terms to optimize. SEO can make a huge difference in your results, but it is not cheap. Typical SEO services vary in cost from $500 to $1,000 per month or more. Good SEO is expensive, but it does deliver a very good ROI if done correctly with a good website. However, if you add just one client that pays fees of $10,000 or more per year or for a single project, this marketing expense has more than paid for itself.

Consider your web presence. If you have a marginal website, outsiders will perceive that your services are marginal, too. If you do the right work with the right professionals, you will have an image that is professional, conveys your key messages, works on multiple browsers and platforms, and allows you to be found easily in your local market. So how much is one client worth? ●

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7 Easily Missed SEO Opportunities

Search Engine Optimization, or SEO, is a collection of tactics that are applied to your website to help it rank better in the results when people use searches to find people and businesses they need. SEO, as an industry, literally changes every day. Search engines, like Google, constantly tweak how they rank and present search findings. These very sophisticated algorithms (mathematical formulas that rank websites) are revised about 500 times per year.

Some of the SEO tactics you are currently using may actually be considered ineffective or spam. Examples include keyword stuffing, text the same color as the background, reciprocal linking, buying links and certain meta tags. These tactics don't affect rankings anymore, and some could even get your site completely banned from search results.

Implementing best practices can ensure that you rank well and appear higher on the search results, and there is a very good chance that you are not taking full advantage of these current opportunities. Here are seven ways to quickly boost your ranking and web presence so more people will find you:

1) **Robots.txt File:** The robots.txt file tells Google, Yahoo!, Bing and other web crawlers how to access your site. If your website has a non-existent or improperly written robots.txt file, your site would be like a locked door to search engines. To check, visit www.YourWebsite.com/robots.txt and visit www.robotstxt.org for more information on how to write it. Or better yet, seek the advice of a professional who can offer more advanced tips for creating an effective robots.txt file.

2) **Google & Bing Webmaster Tools**: Search engines provide an incredible amount of useful data about your website. These tools allow you to view how often your site is visited (or *crawled* is the technical term) by search engines scouring the web, which pages are indexed, error diagnoses and much more. It is important to know how your site is accessed on the web and how to better manage it. You can find more detail and verify your website at http://www.google.com/webmasters and Bing.com/Webmaster.

3) **Optimized Multimedia:** Search engines don't access pictures, video or audio, because they do not know how to interpret and therefore index multimedia. However, by adding attributes (metadata), such as file name, alt tags and descriptions, this information suddenly becomes alive and can be searched and indexed. For instance, for a short movie about Accounting Best Practices, use *Accounting-best-practices.mov* instead of *movie1.mov*.

4) **URLs:** It was once incredibly popular to use keywords in your URL. A URL of www.example.com/keyword-rich-url.html, for example, is not as effective, but such a naming practice is still recommended over "www.example.com/?pageid=1&articleid=7&sourceid=44." Ensure that your URLs include keywords.

5) **Internal Linking:** The way that pages are navigated within a website is important. The blue, underlined text you click on is called the "anchor text." The words used in the link should be descriptive of the page you link to. Always avoid using links that say "Click Here" or "More." Instead, use something like "Tax Season Help" for a link to helpful articles and links for tax season.

6) **Social Media Integration:** There is absolutely no doubt that social media has taken over the internet in the past few years. These social properties can be leveraged to help boost your website and your business in search engine rankings. I suggest you use Twitter for short, frequent updates and tips; Facebook for less frequent sharing, picture posting and culture showcasing; YouTube or Vimeo for videos; LinkedIn for professional information; and Foursquare and Facebook Places for check-ins.

7) **Go Local:** It is untrue that you have to be a large national or international company to promote yourself on the internet. Most traffic that comes to your site is going to be individuals and businesses within a radius of just a few miles. Google, Yahoo! and Bing (both desktop and mobile) are quick to determine your current location and deliver results that are geographically tailored. It is easy to register your business at the big ones: google.com/places, Bing.com/Local and Yelp.com. Reviews are encouraged, so incentivize your clients to write reviews, and you will reap the benefits in search results.

8) **Bonus Tip: Track Your Site:** If you are not currently tracking the activity and worthiness of your website, I recommend you visit Google.com/Analytics to set up a free account. Most website content management systems and developers can quickly and easily install a Google Analytics tracking code. It provides priceless data on your visitors such as how much time they spend on which pages and which pages are most popular.

These are just a few SEO helpful tips and tactics that can help boost your rankings and overall search engine presence. There are well over 200 signals that search algorithms take into account, and some weigh more heavily than others … so this only scratches the surface. There is no silver bullet that can take your site to #1, but employing the basics in a way search engines like is a great way to get an advantage over your competitors.

By Justin Spencer

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Marketing from Square One

For firms new to marketing, it's best to take it one day (and project) at a time

Marketing is starting to get its due attention in the profession. Firm leaders understand the importance of consistent, frequent communications with prospects and clients in order to grow a successful, profitable business. However, while many are stoked about starting a marketing program, initial enthusiasm can quickly turn to frustration if more is bitten off than can be chewed comfortably. That would be referred to as *marketing lockjaw*. And no one likes that.

The general rule for marketing is to start from square one and build from there. That can mean planning a single campaign and seeing it through to launch … then planning the next initiative … then perhaps multiple campaigns at once. Marketing is a great deal of trial and error. And there's a lot for you to figure out along the way, like identifying what campaigns are most effective, evaluating cost (digital versus print), and recognizing your capacity for managing marketing projects. But rest assured that with each new campaign, be it a simple email or a client newsletter, you will get more comfortable in your role as "marketer."

For now, scratch the notion that you have to write a comprehensive annual marketing plan. All you need is that first campaign and the courage to hit the "Send" button. To help you get going on an initial project, you have to ask yourself (and know the answers to) a few simple questions:

What is the purpose? What is the intended outcome? This can be anything from breaking into a new client niche to providing valuable information to existing clients. In other words, you need to know "why" you are sending the campaign.

Who is my audience, and am I sending the campaign to prospects or existing clients? If prospects, am I sending to all prospects in my database or do I want to identify a specific industry (e.g., veterinarian clinics)?

What's my mechanism for delivery? Print campaign, email blast, hand-delivered welcome kit?

Once you've answered these questions, you can start to develop your campaign and GET IT ON THE CALENDAR. Setting a deadline for launching the campaign makes you more accountable for seeing it through. After the first campaign is out the door, start to identify and add other initiatives to the calendar. Before you know it, you have a good start to your broad marketing plan.

Question by Question

To help firms along the marketing path, here is a bit more information on each question and what needs to be done to ensure a successful, on-target marketing initiative.

What is the purpose? You must determine a purpose for each campaign. In other words, once your audience reads your campaign, ideally what do you want them to do? What is the intended outcome? Do you want them to visit your website to sign up for an event? Are you simply generating awareness or introducing your firm? Are you trying to transition prospects to clients? Defining the outcome for each campaign will help you craft an appropriate message.

For example, if your intended outcome is to have the audience visit your website for more information on your services, be sure your web address is prominently placed and that you clearly ask the reader to visit your site. If you want them to email you directly or call, be sure the email address and phone number are easily found. The biggest mistake you can make is asking your reader to do nothing, because that is exactly what they will do.

Who is my audience? Think of your marketing audience as a client. You would never enter a client meeting without reviewing the client's file and having an up-to-date understanding of their needs. Each audience you market to deserves the same consideration. Approach your next marketing campaign by first determining who you want to reach. Start with the basics. Are you communicating with current clients or prospects? Current clients already know you so there's no need re-introduce your firm. Prospects don't know a lot (if anything) about you so you need to invest ample time to explain who you are and the value your firm can provide.

Next, dig a bit deeper. Are you trying to reach a unique niche? For example, if you are trying to enter a new niche, such as medical practices, you want to make sure that you communicate your niche expertise within your campaign. Your message should emphasize your industry knowledge in such areas as billing routine and compensation rates. It's SO important to know your audience.

What's my mechanism for delivery? What is the best mechanism to get your campaign or marketing piece in the hands of your intended audience? Will you send an electronic communication or a print campaign? Be sure to take cost and timing into consideration. Print campaigns can be expensive and require extended production time for printing and mailing. In the end, you need to decide what delivery method will be most effective.

There's no shame in starting from square one when it comes to marketing. In fact, you are more likely to build a successful marketing program by starting simple and taking the time to learn what is takes to be a successful marketer. ●

Kristy Short, Ed.D

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The Sage Business Intelligence Revolution

Sage Business Intelligence, powered by Alchemex, is a solution that provides drag-and-drop reporting for Sage Peachtree, Sage Simply Accounting, Sage ERP MAS 90, Sage ERP MAS 200, Sage ERP MAS 500, and Sage ERP ACCPAC (This tool was first discussed in the April/May 2011 issue). In the months since its launch, Sage's strategy for supporting business intelligence initiatives in small businesses has become clearer, and some resources and marketplaces have launched, making it easier for end users to implement these reporting solutions. These new tools make it easier than ever to have more dynamic and accurate reporting from both mid-range and entry-level business management software.

For more information on how Sage and Alchemex have enhanced their efforts to promote and support Peachtree Business Intelligence, visit CPAPracticeAdvisor.com/peachtree. Here is a summary of what is included:

- Self-help manuals
- Sage University training courses
- Training webinars
- Training videos
- Customer forums
- E-mail newsletters

The site also has examples of sample reports in a single Microsoft Excel workbook for those who would like to see examples of the analyses included with the product.

While Sage North America has a strategic alliance with Alchemex, it is not the only application that utilizes this reporting tool with business management software. Alchemex business intelligence tools offer integration with many other applications, including Sage Line 50 (UK), Sage Pastel (South Africa), SAP Business One, SYSPRO, and MYOB (Australia). These alliances give the product an extremely broad base of potential users worldwide, and provide accountants and consultants with additional opportunities to earn a return on their investment of time and money required to master this platform.

Alchemex provides forums for consultants and end users to exchange best practices for using the various business intelligence applications on the Business Intelligence Community message boards at http://community.alchemex.com. The site includes over 25 forums with discussions for each supported accounting/ERP application, a group for sharing report templates with other users, links to archives of weekly topical webinars, as well as specialized forums for Alchemex Certified Professional Consultants, Certified Business Partners, Certified Training Centers, Certified Professional Trainers, and those interested in reselling reports to third parties.

The Alchemex Connector is a tool that extends the capabilities of Sage Business Intelligence and extracts data from most other tools supporting open database standards. This connectivity permits users to create real-time reporting based on almost any available system or database. Information from multiple data sources can be combined together and reported using a familiar Excel interface.

Figure 1 - Sage Business Intelligence uses open database protocols to create, access, and report on financial and non-financial data contained in Sage ERP applications. (Source: Alchemex)

Priced as a $100 add-on to Peachtree Business Intelligence, the Connector simplifies the process of creating real-time data feeds from existing information sources such as vertical industry applications, customer relationship management systems, and internally developed tools in end-user products like Microsoft Access databases.

In the months since the launch of Peachtree 2012 is the introduction of online stores where third-party developers sell custom reports for Sage Business Intelligence reports. One such website, The Intelligence Store (www.TheIntelligenceStore.com), has created a number of free and low-cost reporting templates that work with applications such as Sage Peachtree, Sage Simply Accounting, Sage ERP Accpac, Sage ERP MAS 500, Sage ERP MAS 90/200, and Sage Pastel. This company also maintains a blog on business intelligence-related topics at http://bxintelligence.wordpress.com.

Early feedback indicates that some Sage partners see the Business Intelligence tools as a way to leverage their existing reporting skills into interactive, real-time analysis. Although some IT purists are threatened by the move toward self-service business intelligence, many analysts, including The Gartner Group, have acknowledged that Excel is the preferred tool of most business users for analyzing and consuming business intelligence information. Tools like Microsoft Excel PivotTables and Pivot Charts, the Alchemex Connector, and the Microsoft PowerPivot self-service business intelligence tool for Office 2010 (www.PowerPivot.com) make it possible for accountants to create sophisticated analyses, which were previously only available to the largest companies.

The ways companies buy and implement software will continue to evolve, and both end users and consultants must continue to look for ways to provide value in a competitive marketplace. Tools like Sage Business Intelligence create competitive advantage for the organizations who use them as well as the accountants and consultants who learn how to successfully work with them. These leaders will be positioned to take advantage of many new opportunities not available to those who ignore this self-service business intelligence revolution.

Figure 2 - TheIntelligenceStore.com is a marketplace that sells custom reports for Sage Business Intelligence platforms.

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Someone Knocking at the Door?

As the regular readers of this column know, I like to reference rock'n'roll from the 70s. This time, as I sit down to write my column about listening to your customers, one of my favorite songs from the Wings comes to mind.

"Someone's knocking at the door,
Somebody's ringing the bell,
Someone's knocking at the door,
Somebody's ringing the bell,
Do me a favor, open the door and let 'em in."

I hope that leaves you singing the song in your head as I did. This song serves as a constant reminder for me to listen to my customers.

For me, customers and their input are always there just waiting to be heard. They're knocking on the door and ringing the doorbell. We just don't always hear them. Maybe that's because we're busy doing other things, moving on to the next project, solving the next problem … and we fail to "let 'em in."

Letting them in, though, is one of the most important things you can do to ensure your success. Customers have great ideas about their experience with you. They can tell you who you are and why others should buy from you. They can tell you how to make their lives even easier, and if you listen to the feedback they become happier customers. And therein lies the key to a healthy business. Happy customers promote your service to other people, thereby bringing you more happy customers.

One of the many things I learned from my grandfather was the importance of listening. For him, it was natural. He didn't talk much; he just listened. Active listening in any conversation is always a good idea, but as my career progressed I learned that there are proactive ways to listen to your customers, as well. When I was at Intuit, I learned the classic market research tools used by the biggest companies: interactive interviews with small focus groups and quantitative research through questionnaires to customers or prospects.

While both of these forms of research can take on lives of their own, there are simple ways to approach them. One of my favorite bosses taught me the importance of just talking to a handful of customers. His experience had taught him that talking to 10 customers would get you 80% to 90% of what you needed to know. I agree wholeheartedly. So jot down a list of questions you would like to know the answers to, and call up 10 customers. If you haven't ever tried this, you will be surprised by how much you learn.

If you feel you need a broader sampling, use a tool like www.surveymonkey.com to send a questionnaire out to all of your customers. I have been using this tool for many years. Within a few days, you will know what your customers think and how they feel.

The above methods are great ways to get you engaged with customers about services and tools that you might be considering. And while gaining a better understanding of your customer's needs is important, it is even more important to first understand how well you are currently serving your customers.

In the last 10 years, a tremendous amount of research has been done to determine the best way to gauge customer satisfaction. I think the research that makes the most sense is based on how strongly your customers would refer others to your service. You can test this with a NetPromoter score, which you can get more information on at www.netpromoter.com.

I've been using this methodology for the last eight years. The easiest way to do it is to follow the questions in the book (less than 10) using a survey tool such as Survey Monkey. The beauty of the NetPromoter score is that it is simple for customers to respond to, and you get an answer very quickly.

So what's keeping you from doing it? I have used an accountant for more than 20 years and never once have I been asked for feedback on how likely I am to make a referral or what the firm could do better. Given the ease of surveying customers these days, I hope this will change. Accountants have some of the strongest customer relationships, which have been built primarily through active listening techniques like the ones my grandfather taught me. Using the simple tools and methods noted here will make them even stronger. I am very curious to see what happens as firms start applying more tools to the process of listening. You never know … it might lead to lots of people knocking at your door (ring ring) ☺

Rene Lacerte

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10 Tools for Building a Better Website

Find these reviews online:
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At one time, an accounting firm's website could get away with being little more than an online business card: static by today's standards and largely uninformative. Then, sites evolved into online brochures with a homepage/cover that offered links inside to descriptions of services and staff. Today's innovative site might offer a tax calculator, the ability to email reminders of important tax dates, and even feature (only for the edgiest of firms) a partner's blog.

Boy, how times times have changed! If this year's collection of website building tools is any indication, the kind of providers is as diverse as the number of them. Yet, what's always interesting to me is not necessarily the number of providers, but that they exist for one, sole purpose: To provide an alternative.

This is all about the kind of person who shops at Home Depot for drywall tape or the kind of person who shops the same store for batteries … and has no idea what drywall tape is. After many years of working with the accounting profession, I've found that most firms want a website (or any kind of technology) presented to them in a wrapped box with a fancy bow.

The typical accountant doesn't want to spend time or resources developing and maintaining a website. It's far more beneficial for them to focus on what they do best.

Clearly, offering site-building help to accounting firms is hot, and providers are offering more features than ever … not to mention that fees range from a few dollars a month to hundreds for additional storage or even thousands for a specialized service.

The bottom line? Firms are happy to pay these fees for dynamic sites with reliable hosting.

Features & More Features

What features are popular? Today's firm wants a website that is far beyond the electronic brochure. Here's what today's site builders are offering:

- Client portal integration and high page counts.
- Growing numbers of templates for page layout.
- Simplified construction, including text editors and the ability to change layouts without tech assistance or fees.
- Help with content, including news and sometimes thousands of articles that aren't, admittedly, usually exclusive to a given firm's use.
- Newsletters.
- Initial free trials.
- Email.
- Firm-owned domain names and free transfer of content and data if the firm elects to leave the provider's service.

Providers are also offering integration with SaaS applications that cover accounting, payroll and other third-party solutions, as well as support for an increasing number of browsers for both PC and Mac. Some even help optimize websites for mobile browsers for smartphones, tablets and other portable devices.

More is More

Providers know they can offer firms a lot more than secure hosting, which, in itself, is growing more sophisticated with better anti-spam protection, more frequent backup and tougher servers to hack. Several vendors this year reported that customizing firm sites is a major selling point, as is offering copywriting and design services. These services are often offered for an additional charge, but are sometimes included as part of the standard site-building package. Many providers are also offering the capability to pre-schedule emails in addition to adding email marketing services.

E-Commerce is becoming more alluring for firms, and providers have responded with support and integration for many e-commerce and payment platforms, including PayPal, Amazon, etc. And, of course, some vendors are offering blogs or integration with blogging platforms.

Cutting-Edge Stuff

Many vendors now offer search engine optimization (SEO), which helps firms write and build their sites to rate high in searches. Providers now have tracking and reporting tools that record when a search of a firm's site took place, who searched using what keywords, what country the searcher was from, etc.

Social marketing links to Facebook, LinkedIn, Twitter, YouTube and other applications are also finding their way into these tools. And of course, some vendors are realizing the strong need to provide integration with client portals.

Get Away From Templates

The time has rarely been better for an accounting firm to look for a provider to help build a website. Let's face the truth: Accountants just aren't going to try and do it themselves and probably don't want to.

While templates are necessary and can help firms get online quickly, many of the current offerings in this space need a concerted effort to veer away from offering only a template-based solution. I know it's far more economical for them to offer templates rather that 100% custom pages (and some do offer custom site building services), but providers would realize a huge advantage if they concentrated on giving each firm a unique and individual look and feel. ●

Intuit, Inc. — Intuit Websites

websites.intuit.com

BEST FIT

Virtually any small business, including tax and accounting practices, wanting a simple and automated website creation system.

STRENGTHS

- Easy to add Intuit Web Payment service for ecommerce activities.
- Good search engine optimization tools.
- Includes email marketing features and an online small business marketing toolkit.
- Broad collection of template designs.
- Customized blog service can be integrated into websites.

POTENTIAL LIMITATIONS

- System not specifically tailored to needs of accounting practice.
- There are no options for syndicated news content, newsletters or accounting/tax-related content or calculators.
- No integration with professional accounting, tax or document management systems.
- No client portals.

SUMMARY & PRICING

With Intuit Websites, Intuit truly is catering to the needs of the busy small business owner who doesn't have a lot of time or a lot of resources to create a useable site. Accounting professionals will also find the simplicity of the signup process and creation of the site to be very painless. Intuit offers three levels of pricing, with each based on the number of available pages, amount of storage, number of email addresses, and a few other bells and whistles. The Starter plan, also called "Personal," offers a 30-day free trial and is $4.99/month. With the Gold or "Business" plan, the first 30 days are also free, and the cost is $19.99/month. The Platinum or "Professional" plan is $49.99 per month.

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10358891

Thomson Reuters — Web Builder CS

CS.ThomsonReuters.com

BEST FIT

The system can be used by any firm, but it's optimized for use by professional practices using the CS Professional Suite of accounting and practice management programs.

STRENGTHS

- Client portals enable secure collaboration and document sharing.
- Integration with CS Professional Suite.
- Professional layouts, images and background colors.
- Support for unique domains.
- Calculators and track-refund links.
- Custom site building available for an additional fee.

POTENTIAL LIMITATIONS

- Somewhat limited free content, charge for additional content.
- No automated social media integration.
- Extra charge for web email service.

SUMMARY & PRICING

Like other giants in the field of site building, Thomson Reuters has a proven track record and a solid offering for firms. Firms who use other components of the Thomson Reuters CS Professional Suite of programs will find Web Builder CS a good fit for their practices. Setup is $350 with a basic recurring cost of $65 per month (or $780 per year). PPC Tax and Business Alerts are included in this price, as is Forefield KnowledgeTrust content. PPC advanced newsletters are $20 per month ($240/year), and Web email service (up to five accounts) is $10 per month ($120/year). Additional email accounts are $2 each. For firms who want Thomson Reuters to create a website for them, the Web Builder CS Design Service add-on is available for a one-time charge of $350.

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10358897

CCH, a Wolters Kluwer business — CCH Site Builder

CCHGroup.com/SiteBuilder

BEST FIT

CCH Site Builder is one of the longer-established players in the website builders market and can be used by any firm. It is part of the ProSystem *fx* suite of applications and is an ideal fit for firms who use other components of the ProSystem *fx* product suite.

STRENGTHS

- Recent updates include redesigns, additional tools and content, enhanced customization, file share security and more.
- Two portal options: File Share and ProSystem *fx* Portal.
- Nearly 100 different templates with thousands of different combinations available; new templates added regularly.
- Design services provide fully customized site design options.
- Users can use CCH content or their own.
- Expansive SEO tools & Google Analytics supported.
- Unique domains available and owned by the firm.
- Email marketing included.

POSSIBLE LIMITATIONS

- No current blogging engine and only basic social media options currently available (tighter integration with social media platforms and mobile browsers slated for later this year).

SUMMARY & PRICING

CCH is one of the premier providers of accounting software across a range of applications, and the vendor's advancement in this area proves that the company is aggressively continuing to tackle the website and design needs of tax and accounting professionals. Setup costs $295 with an annual fee of $995, which includes e-mail account hosting and spam filtering, eNewsletters, secure file exchange, and much more. Premium content and options available include the following: CCH Tax Guide, Life Cycle Reading Rack for the Individual or Business, Domain registration, Financial Planning Toolkit, Business Owners Toolkit, ProSystem *fx* Portal (for needs beyond simple file exchange), additional email accounts and storage, Custom and Deluxe Web and Graphic Design packages, and Customized SEO consulting services.

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10358710

Drake Software 1040.com Preparer Websites

www.1040.com

BEST FIT

Drake's 1040.com preparer websites are exclusively for Drake Software users, and have gone through a full modification in layout, look, color scheme, enhanced ease of use and full edit capabilities.

STRENGTHS

- Free for Drake Software users.
- Unlimited pages.
- Built-in counter for measuring site traffic.
- Reporting tools allow users to monitor visits, clients using the site, as well as any income generated by the site.
- The prep-site template offers linking to social media platforms.
- Users receive free subdomain (prep.1040.com/yournamehere).
- Blog portals may be linked to site, and syndicated news content is provided by Taxingsubjects.com; additional content available for a fee.
- Firms can offer do-it-yourself online tax preparation through their websites.

POTENTIAL LIMITATIONS

- Only seven customizable layouts.
- No client portal integration or compatibility with Google Analytics available at this time.
- Unique domain names require upgrade.

SUMMARY & PRICING

Drake's 1040.com preparer websites have gone through a full modification and offer a dynamite premise: preparers helping clients do their taxes online easily and inexpensively. And the long-established Drake Software seems like the logical provider to move this good idea ahead. Setup is free for existing Drake Software customers with no recurring costs for users of the full package.

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10358734

AccountantsWorld — Website Relief

www.accountantsworld.com/wr

BEST FIT

Tax and accounting firms who want tight integration with the vendor's web-based product suite.

STRENGTHS

- Expanded and improved library of customizable templates provides unlimited combinations.
- Users have direct access with tight integration to all AccountantsWorld cloud applications.
- Syndicated news content, including stock and custom RSS feeds, and AW-supplied newsletters are also available.
- Search engine submissions and automatic stats are available, along with optional Google Analytics tracking and optional premium placement on the AccountantsWorld "Find an Accountant" directory.
- Tax organizer collects client data online, and can be uploaded directly into many tax software applications.
- Appointment scheduler integrates with Practice Relief and includes an email reminder feature.
- Client portals and online solutions can be added with the CyberCabinet document management system and portal.

POTENTIAL LIMITATIONS

- Social media integration is limited to Facebook widgets and Twitter buttons.
- Additional charge for more than five e-mail accounts.

SUMMARY & PRICING

With its many user-rich features, Website Relief is a capable competitor to other website building providers. AccountantsWorld has a strong company history with the profession, and offers a simple yet powerful interface and good integration with other applications. Website Relief setup is free with an annual cost of $595 per year or $59 per month. A standard directory listing in the AccountantsWorld Directory of Accounting Professionals is included in the price. Users may also purchase the Gold Directory listing ($395) with enhanced top-of-page listing or opt for Premier Web Services, with site design and updating services offered at $99 per hour.

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10357824

Build Your Firm — Website Development & Internet Marketing

http://websites.buildyourfirm.com

BEST FIT

Build Your Firm intentionally focuses on the small firm as its primary customer.

STRENGTHS

- Over 95 modifiable templates available (customization services also offered).
- Variety of free add-ons such as file transfer, logo integration, credit card processing, e-commerce, spam filtering, portals, etc.)
- Provides statistics for site tracking; also integrates with Google Analytics and other third parties, as well as social media integration.
- Enhanced email newsletter marketing included.
- Integrates with client-facing SaaS applications from many publishers.

POTENTIAL LIMITATIONS

- Extra fee charged for more than 10 email accounts and for upgrades to storage space.
- Does not offer blogging engine, but works with third-party blog providers.

SUMMARY & PRICING

BYF is constantly adjusting its feature set, not only to keep up with the latest technologies, but to give its customers what they need. BYF may not be the most well-known among website builder providers, but they offer an impressive tool that can be customized as needed. BYF offers a 60-day, no-risk trial, and standard accounting sites have no setup fee. Custom niche sites have a setup fee of $1,000 to $2,000. Monthly charges are $69.99 for a starter site, and $83.33 for premier and niche sites.

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10352752

AFSB Accounting and Financial Site Builder

www.afsb.net

BEST FIT

AFSB has a strong retention rate with tax and accounting firms looking to establish a professional web presence at a low cost.

STRENGTHS

- Unlimited site pages.
- Integration with Google Analytics.
- Unique domain names, up to 20 free email accounts, and monthly newsletter service included.
- Client portals available for secure file transfer.
- More than 50 financial calculators.
- Allows for events calendar and Google maps.
- Credit card payment gateway available.
- Template system using Cascading Style Sheets-technology, a billboard homepage feature and the ability to use Flash technology.

POTENTIAL LIMITATIONS

- Social media integration limited to social media buttons.

SUMMARY & PRICING

Moving ahead after years of innovation and poised to add even more of the features today's firms want, AFSB is a solid offering among website builders for tax and accounting professionals. Basic recurring cost averages $23.99 per month ($287.89 annual subscription). A 60-day free trial is available, and there are no contracts. A low-cost guarantee comes with all sites. Domain transfer is free. Search engine registration is $30. If requested, AFSB will create a custom site design for $250.

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10358633

Emochila, Inc. — Websites for Accountants

www.emochila.com

BEST FIT

Tax and accounting firms who want a truly customized website backed by a vendor who has heavily invested in updating its products over the past nine months.

STRENGTHS

- Not limited to template-based or out-of-the-box header, button, content field designs and layouts.
- Unlimited pages.
- SEO optimized with embedded search engine submission system and statistics pages.
- Unique customer-owned domain names.
- Emochila manages and maintains all client sites, with unlimited website edits included.
- Newsletters service included.
- System can sync an entire firm's email to Gmail.
- Four free hours of CPE credits through CPElink.com.
- Designers utilize new programming languages, including html5, css3 and jQuery.

POTENTIAL LIMITATIONS

- Firms cannot directly manage their own websites, even for simple changes.
- Websites include a "Powered by eMochila" logo and link at the bottom of each page.

SUMMARY & PRICING

Emochila's Websites for Accountants can truly look the way a first-class designer would envision them … and function the way a technologist would want. The company's work over the last nine months to upgrade its design and functionality should have a big impact in the site building arena. There is no setup cost, and the basic recurring fee is $70 a month. Add-ons include individual, professional graphic design for a fee ranging from $499 to $1,999. The company notes that the most popular add-on is the $999 design package. Design add-ons include personalized logo, custom-built graphic design and animated design.

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10358871

PRACTICAL RESOURCES

CLASSIFIED

BY ISAAC M. O'BANNON, *TECHNOLOGY EDITOR*

Creativity at Work: A Different Kind of Auditor, a Different Kind of Firm

Accountants and accounting firms have long suffered from the false stereotype of being stodgy, even predictable and boring. Even more so, the auditor: that truly numbers-focused researcher of data whose sole purpose is to determine the propriety of an organization's financial reporting and their internal controls over financial reporting. Perhaps only actuaries are more maligned in their public perception.

But what happens when a young CPA with a background in music and graphic design challenges those notions?

Tim Gavin, CPA, MBA
Audit Supervisor — Sikich LLP
LOCATION: Aurora, Ill.
WEBSITE: www.Sikich.com
PRACTICE SPECIALTIES: A&A, Valuation, Tax Services, Investment Banking, Corporate Finance, Technology Services, HR Consulting, International Business Services, Performance Measurement, Marketing & Graphic Design
EDUCATION: BS, North Central College; MBA, Northern Illinois University
SOCIAL NETWORKING:
Twitter: www.twitter.com/TGavinCPA
LinkedIn: http://www.linkedin.com/profile/view?id=10370682
Blog: http://blog.sikichtechnology.com
LAST BOOK READ: "1984" by George Orwell
SMARTPHONE OF CHOICE: Android (EVO 4G)
LAST CONFERENCE ATTENDED: Illinois Government Finance Officers Association annual conference
FAVORITE WEBSITE: LinkedIn
HOBBIES: Playing guitar, drums; writing/recording music; running

While the curmudgeon stereotype may occasionally be deserved, especially at large practices with rigid corporate cultures, it certainly isn't fitting for Tim Gavin or the firm for which he works, Sikich, LLP (www.Sikich.com). The 30 year-old CPA and auditor has worked out of the firm's Aurora, Illinois, office since graduating college, and moved into the role of audit supervisor after attaining his credential.

Tim's primary engagements involve audits of local governments, which he notes have seen significant changes in their audit and financial reporting requirements over the past few years. At the same time, local governments have experienced shrinking staffs and payrolls, and this combination has brought challenges in their financial management, processes and internal controls. Sikich has developed a core specialty in providing audits to these entities, and is the largest provider of these services in the Chicago area, with some municipal clients having up to 200,000 residents. In addition to audits and other attestation functions, the firm's government team has a services side that regularly provides local governments with temporary in-office staff and management.

As with most audit engagements, much of the work is done in the field. That's definitely the case with Tim, who estimates he sometimes sees his office as little as one or two days a month, and an aggregate of perhaps two months out of the year. Fortunately, most of his engagements are in the Chicago area, which allows the husband and father of two to have dinner with his family and then, if necessary, continue work from home in the evenings.

"I mostly work from client sites and from home, and only have to go in for occasional reporting and planning," he noted. "But since Sikich is a very technologically progressive firm, we always have full remote connectivity with the engagement management systems we use, as well as our other professional applications."

As an experienced field auditor, Tim also helps identify new technology tools and helped his firm implement the use of additional mobile monitors. Sikich has long had multiple monitors for workstations, but the challenge of finding an easily portable option for their field teams was a challenge. The firm ultimately decided on standard desktop LCD monitors with GearGrip LCD shield harnesses from Case Ace (www.geargrip.com).

Sikich realized early on the significant role of technology in the modern practice. In the mid-1980s, the firm had two office locations, but would soon experience dramatic growth as a result of the strategic foresight of CEO Jim Sikich, CPA, and other partners, who expanded the firm into less traditional service areas. In addition to A&A, taxation, business valuation, investment banking, retirement plan services, and wealth management, the practice also has specialties in human resource consulting, technology services, and graphic design and marketing.

This broad collection of client services has enabled Sikich LLP, which has a history stretching more than 80 years, to grow to a staff of approximately 375 members and 57 partners, located in nearly a dozen offices around Chicago, Indianapolis and St. Louis. It is listed as the 50th largest accounting firm in the United States. The firm scored a 389 on the CPA Practice Advisor's Productivity Survey, a free web-based tool that helps firms assess their workflow and technology usage, and provides benchmarking against similarly sized practices (www.CPAPracticeAdvisor.com/productivity-survey). This score is impressive for a firm the size of Sikich, since large practices can easily become entrenched in legacy systems and practices.

With these various services, a young CPA who passed all four parts of the exam on his first try might be tempted to diversify his own experience, at least for resume-building purposes … but not Tim.

"I love audit engagements; they're logical and structured and concrete, but not without their share of curveballs. While there are some changes to FASB, GASB and GAAP, they aren't nearly as volatile as tax law, which I think is dry and aggravating." Since his focus is on local government audits, his primary "busy season" is a little longer and less severe than that of professionals who focus on tax compliance or auditing for-profit entities. He estimates that he works about 55 to 60 hours per week during the summer months, then closer to 45 to 50 hours per week during the rest of the year.

As for his resume, he doesn't anticipate needing

I LOVE AUDIT ENGAGEMENTS; THEY'RE LOGICAL AND STRUCTURED AND CONCRETE, BUT NOT WITHOUT THEIR SHARE OF CURVEBALLS.

Tim and his wife Erin, live in Naperville, Ill., with their daughters Alayna and Alice.

one again, since he says he hopes to stay with Sikich for his entire career. "I've worked with the same partners for years, and feel that they are helping guide me toward a partnership role. I can't think of anything that would be more fulfilling." Tim has already started leading some technology training sessions, and is a contributor to the firm's blog (http://blog.sikichtechnology.com).

Tim's respect for Sikich isn't just grandstanding or kissing up to his bosses. Although it's the only practice he's worked for, he has heard about the dynamics at other firms from some of his peers and has come to appreciate the collaborative and creative environment in which he works. "Sikich fosters creativity and attracts it. That's why I was drawn here, and that's why a lot of other young professionals are, too."

In some ways, Tim says that the office might even resemble a dot-com era environment, albeit one run by fiscally responsible CPAs. He said it has an open atmosphere and work-casual dress code that allows jeans and polo shirts when clients aren't visiting, and a tie is rarely in sight even when clients are. The office also offers rooms for playing games, working out or relaxing.

Prior to Sikich, Tim worked at Brookdale Music (www.BrookdaleMusic.com), a retail musical instrument store in his hometown of Naperville, Illinois, while he was in high school and while attending North Central College for his BS in accounting. And actually, he was initially considering a career in sound engineering. He later received an MBA from Northern Illinois University. At Brookdale, which is coincidentally owned by a CPA, Tim managed the inventory and also did some graphic design work and web development.

Tim and his wife Erin, who will be celebrating their ninth anniversary in November, live in Naperville, with their daughters Alayna and Alice. They spend their free time doing "normal family and household stuff." But when they can get away, they enjoy Eagle Ridge Resort and playing tourists in Galena, an Illinois vacation spot on the Mississippi River famous for its antique stores, golfing and lakes.

The family is active with their church, Bethany Lutheran (www.bethanylcs.org) in Naperville, where Tim is a part of a capital fundraising campaign. Erin is a volunteer with Literacy DuPage, an adult literacy program. Tim, being a Chicago-area native, is a life-long fan of the Cubs, Bears and Bulls, of course.

6 Key Senses to a New World of Creative Service

In Daniel Pink's popular book, "A Whole New Mind: Why Right-Brainers Will Rule the Future," he discusses the seismic shift in thinking and service from the left-brained logical thinkers to the right-brained non-linear holistic thinkers. The first group thinks in order, the latter thinks outside of the box.

This book is really an eye-opener and totally solidified my penchant towards creative services and our customers who think outside of the box. These customers see what is not there, and I love to pursue ideas with them that can change their lives … not merely finish their tax returns.

Pink notes three huge changes in our world that are forcing our left-brain restrictions into more creative right-brain "soft skills": Abundance, Asia and Automation.

Jason Blumer, CPA.CITP

Jason M. Blumer, CPA.CITP, CFE, is managing shareholder of Blumer & Associates, CPAs, PC. He wears flip flops and jeans, says "dude" a lot, and often works in coffee shops with headphones blaring the latest Bloomberg podcasts (though he doesn't understand most of it). Jason loves new game-changing cloud technology and plays rock and roll too loud. His daily duties include consulting, process design, blogging, marketing and business development, innovative thinking, coaching, practice management, and acting as a change agent. Jason founded the THRIVEal +CPA Network to enhance and change the tax and accounting profession based on the foundational tenets of Community, Collaboration, Technology and Innovation.

The material abundance in our world, the shift of left-brain services to Asian countries and the fact that technology is bringing automation to so many of our mundane tasks, has forced this need to remain relevant in a new world of right-brained weirdos.

Innovation is the core of new products, new services and new ideas. And creativity and innovation bring us so many enhancements in life. BMWs, iPhones and Twitter all came from someone thinking outside of the box. Why can't creativity make us better accountants and change our clients' lives in the process? I believe we can offer more innovative services to clients that can enhance their lives and businesses, but we have to make these services up, price them high and practice innovation!

To the masses of public accountants, I believe these "weird" ideas may be scary because they seem to be saying that the tax and accounting professional's job is in danger. Maybe you think if you don't have tattoos or wear tie-dye to work then your world will be quickly absconded by a bunch of artistic accounting posers pretending to be good at math. But it is quite the opposite. Our profession is simply changing, not going away. And there is great joy in serving new customers with newfound creativity. This has always been considered a "most trusted" profession where financials are concerned, and it has the potential to also become the most trusted profession in creating new services and changing business minds all around our world. We are the closest profession to the business process, and we should dictate its greatest changes for the future!

In his book, Pink highlights six essential new senses that he feels are going to be necessary in our new world of creative service:

1 **DESIGN** is the ability to not only create functional services and products, but the ability to create client experience around how you deliver your service. Make the delivery of your tax return beautiful with well-designed online forms, branded firm portals and amazingly clear tax analysis reports for your clients.

2 **STORY** is the ability to fashion a compelling narrative from the plethora of data in our world. Yours and your client's lives are full of information now, and access to additional data is growing every day. We need story to bring the information together in a way that can affect great change in our lives. Story is all about creating compelling arguments and persuasive communications.

3 **SYMPHONY** is the ability to put the pieces together from our world of great specializations. Technology is taking over a lot of our day-to-day activities, and it's time to bring not only *analysis* within our specialty, but *synthesis*. This is the ability to take raw information and create the client's "why" behind their "what." Synthesis is all about creating theories that can be strong foundations on which to operate our businesses.

4 **EMPATHY** is not only the focus on logic, but the ability to build strong bridges into deep relationships, to know why our fellow man and woman do what they do, and to know how to build caring into everything we do. Logic can win an argument between you and your clients, you and your staff, and you and your spouse. But winning in these contexts is not the highest goals within relationships. Understanding the deeper meaning behind our discussions or disagreements is imperative for investing in our future relationships.

5 **PLAY** is another essential sense that our clients want to see. Facebook is one way for our clients to see that we have fun in our personal lives … and are enjoyable to be around. And younger clients really appreciate knowing their professional service provider in deeper, more enjoyable ways. Without time for play, professional accountants will become more of what our world already perceives our profession to be — stodgy, boring and logical.

6 **MEANING** is a more spiritually attuned purpose behind why you do what you do. As a Christian, I find this very important as I search for a daily balance between my work and my personal life. Pink mentions this concept in terms of not just striving to accumulate things, but finding the ultimate purpose behind why you do what you do.

Next month, we'll talk about how to become creative in our firms and how trying on these new six senses can change our firms, our staffs and our clients. For now, allow yourself to see our profession as something different than it has been for the past 30 to 40 years. Perhaps you're thinking this is not for you or your practice, but maybe giving a little freedom to your younger staff to employ Design, Story, Symphony, Empathy, Play and Meaning into their work will bring a newfound freshness to how your clients view you and your firm's innovations.