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CPA Practice Advisor

EDITION

Today's Technology for Tomorrow's Firm

9th ANNUAL INNOVATION AWARDS

2012 Technology & Services Guide

7 Tips for Fostering & Retaining the Best Employees

THE EVOLVING PROFESSION

Teresa Mackintosh has a Front Row Seat

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Think Differently

As many of you know, I'm a big fan of Apple and the late, great Steve Jobs. If you haven't taken the time to read the book, "Steve," by Walter Issacson, I highly encourage you to pick up or download a copy and take the time to absorb the numerous lessons offered.

Like many of you, I grew up during the Apple Era, which is why I was drawn to this book. I discovered incredible insights into many of the decisions that enabled Apple to be what it is today. It's fascinating to learn about the incredible leadership of Steve Jobs and his unprecedented 12-year run after his return to Apple in 1997.

The ideas within the book challenged me to think differently about my business. It's difficult, of course, to apply the same techniques to my firm as Apple did, but Jobs left behind a legacy of brilliant ideas. Here are a few to consider:

- ***Innovation***—Steve Jobs often quoted Wayne Gretsky, the famed professional hockey player, stating: "I skate to where the puck is going to be, not where it has been." This is very evident in Apple's invention, or reinvention, of several products. Ask yourself: How can I be innovative in my practice? Where is the puck ***going to be?*** (Because you already know where it has been.)
- ***Focus***—When Jobs returned to Apple, he discovered that the company was on the brink of bankruptcy. Apple was producing a wide array of products with a vision to develop more in order to increase revenue. Jobs first task included reviewing all products to determine Apple's "core competencies." In other words, what the company did best. Jobs determined that all of Apple's products were just mediocre. He declared from that point on that the company would focus all their resources on making those products "insanely great." Ask yourself: What are my core competencies? What services can I provide insanely great? It's all about focus and defining your business model.
- ***Keep it Simple***—It's important to understand that "simple" is harder to attain than complex. Jobs constantly directed Apple developers to make products simple to use. His theory was that while it requires more time and resources to create a product that is easy to use, ***simple*** is why customers engage. Many of today's firms have processes that are way too complex, and this complexity transitions into how staff work with clients. Ask yourself: Do I offer a great client experience? If not, are my processes long and arduous? How can I make things simple?

These tips represent only a fraction of the hundreds of insights that can be pulled from Walter Issacson's book, "Steve," and applied within your firm. Running an accounting firm is not easy, it requires a lot of effort. And I'm certain that running Apple was not easy either. However, operating a successful business with great services and a quality client experience should always be the main goal. I know it is one that I strive to attain every day. Ask yourself: Do I have this same goal? ●

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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"THE WEB IS FORCING EVOLUTION ON MULTIPLE FRONTS. ALL OF THEM, DRIVEN BY COLLABORATION. COLLABORATION IS AT THE CORE OF THE WEB AND US HUMANS ARE GETTING USED TO IT."

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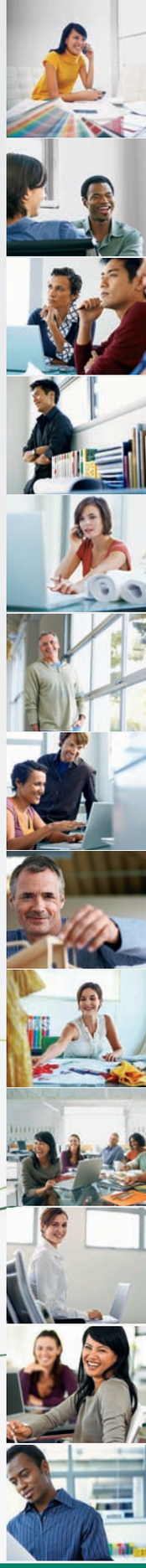

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The Evolving Profession:

Teresa Mackintosh has a Front Row Seat

How much has the profession changed in the last 16 years? Teresa Mackintosh has had one of the most unique front row seats during this time, serving in public practice as a CPA, as well as in various leadership roles with two of the largest technology companies serving tax and accounting professionals.

Over the past decade, much has been said about the nearly generation-wide gap that resulted from several educational trends, including changes in credit hour requirements for the CPA credential during the early 1990s.

The accounting profession has more than rebounded since, and has returned to one of the most desired career pursuits by college students. Yet, those changes combined to create what has been called "the graying of the profession," a phenomena in which a disproportionate percentage of practitioners were in senior ranks. This left fewer professionals with mid-career experience who were prepared to move into leadership positions, but provided a valuable opportunity for exceptional younger professionals who were ready for the challenge.

At about the same time, rapid advances in technology, small business management and workflow practices made it critical for firms to maintain a high level of flexibility and willingness to adapt to changes that may be driven by competitive needs, the expectations of younger professional staff, and even the needs of a new generation of younger and more mobile business clients.

Over the past eight years, our annual "40 Under 40" program has sought to recognize those in professional practice and at technology vendors who are emerging as the next generation of trail blazers for the profession. One of the most notable alumna of this program is Teresa Mackintosh, a CPA who has been honored with that recognition since the program's inception.

In April of this year, Mackintosh joined CCH, a Wolters Kluwer business, as the Executive Vice President and General Manager of Tax, the largest business unit for CCH, and a position recently created to oversee all aspects of the technology vendor's tax-related offerings to public practitioners. Mackintosh's new position is focused on giving firms the resources to advance their business overall, by helping them with internal processes, client collaboration, tax cycle issues and other factors.

Mackintosh served for 16 years at Thomson before that, which became Thomson Reuters in 2008, moving through progressively senior roles in various areas of the organization, including product management, strategic marketing and product development, ultimately becoming general manager and senior vice president of Thomson Reuters' Indirect, Property and Trust Tax division, working from the company's Carrolton, Texas, office. She also spent three years as a tax consultant with PriceWaterhouse after earning the CPA credential in 1996.

"I've been fortunate to have had the opportunity to work with many practice areas and learn from a lot of people," Mackintosh said of her experience with Thomson Reuters. She specifically cites Jack LaRue as a key mentor and valued colleague whom she worked for and alongside in various capacities over the years. LaRue, is currently the general manager of one of the Thomson Reuters' professional payroll systems.

"Jack's real purpose and drive is to be a professor of marketing. He cares deeply about the theory and academics and fun of marketing, how to make it work, but also how to be a student of it. Above all, he taught me that the market is constantly changing and evolving, and that we have to do the same. Jack is a very thoughtful and caring individual who actively works to develop his team."

In her new position with CCH, Mackintosh returns to a role that keeps her in daily contact with tax and accounting professionals in public practice.

"I'm excited to return to working directly with the profession and individual practices," she said. "There's a sense of validation from helping tax and accounting professionals, because it's personal to them, it's about helping them succeed and build for success. For me, it's a much more collegial and family-like environment."

As Mackintosh is among the new generation of leaders emerging within technology vendors that serve the profession, she is also keenly aware of the challenges faced by firms undergoing their own changes.

"The 'graying' of the profession and changes in leadership roles and styles is taking place in firms of all sizes. At the same time, many firms are also are trying to manage changing expectations from their clients, a 'graying' of their client base, who in many cases are also being led by a new group of younger and more tech-inclined entrepreneurs," Mackintosh noted.

"There is a direct parallel between the two sides. Just as CCH understands the need to continually innovate around the application of new technology and changing expecations from professionals,

CONTINUED ON PAGE 54

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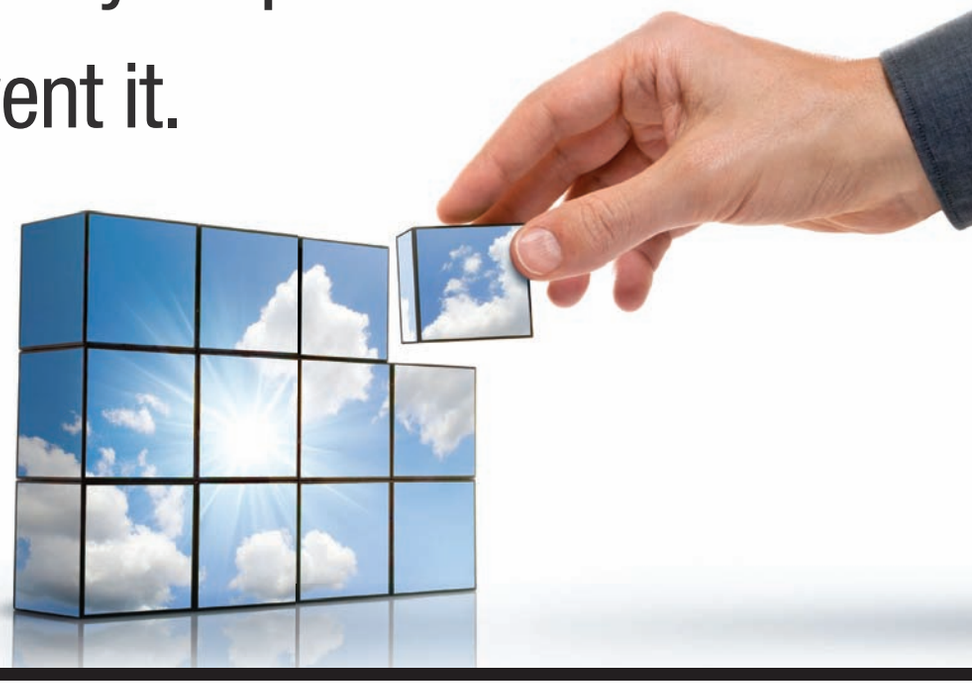

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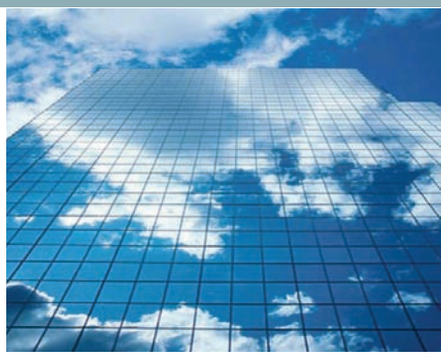

More Cloud is Good for Your Firm & Your Clients' Businesses

I've been in the technology arena for about 20 years. In this time, of all the advances I've seen in both personal and professional technologies, the concept of mobility has been the driving force behind the major changes.

The movement to the cloud has had many names over the past decade: Web 2.0, SaaS, web-based services, net-native programs, etc. But whatever you call it, the coming mass adoption of cloud-based business solutions will have the biggest effect on our work and business lives since computers themselves were first installed on desktops back in the 1980s. Note, that I said "the coming mass adoption," since we aren't really there yet. While the early adapter stage is long past, particularly with accounting programs such as NetSuite, Intacct, BizAutomation and even QuickBooks Online, some of which have been offered in fully online forms since as long ago as 1998. Even professional tax and accounting systems have been available in web-only forms for about the same time, the prime example being the GoSystem RS tax suite from Thomson Reuters, which proves that it isn't necessary to give up functionality for the utility of the web.

Yet, even after more than 10 years and many online programs now boasting tens or hundreds of thousands of users, the challenge in converting businesses and professional accountants to web-based services has been one of proving utility and security.

As far as security of SaaS services goes, we've discussed the topic numerous times and so have top industry analysts and watchdog groups. The plain truth is that web-based programs are safer than programs and data housed on desktops, laptops and servers in an office. Safer from hardware failure like crashes, safer from disasters like fires and floods, and safer from theft.

Proving utility is another subject, however. Those who've already embraced cloud-based systems for some aspects of their business or personal lives all pretty much attest to the convenience, but those who have been reluctant are wanting proof of more than just "it's cool and easy," they are looking for examples of how these systems are better than the in-house legacy programs they are already using.

In some cases, of course, business owners and professionals are just trying to avoid change and having to learn something new, but that strategy never works in the long run. And so, even with a decade of serious study, reporting and anecdotal evidence showing the benefits of SaaS-based systems, there are many holdouts, and the period of true mass adoption is only just beginning.

The surge has been building for the last few years, especially as web-based programs have become available for virtually all areas of work, business, finance and communications that were traditionally performed using programs that were installed on computers or servers. Some say the move toward the cloud started with web-based email services, but it actually started prior to the boom of the PC. It was the mass adoption of the ATM debit card in the late 1970s and early 1980s that gave most Americans their first taste of remote access to financial management. No longer was it necessary to go to an actual bank branch, instead you could just use a card in a machine that remotely linked to the bank's computers.

A decade or so later, the internet revolution brought us hosted email and then business productivity systems arrived. Once again, these various web-based staples have succeeded only after years of skepticism by users, until eventually even the biggest technology curmudgeons adopted email and social media.

That time is finally upon us for truly mass adoption of cloud/SaaS business systems because of two factors:

- They've been tried and tested for a decade or more, and even non-believers have had some interaction with them, whether for paying bills online, checking account statuses or other minor functions.
- The market is demanding it. As younger, more tech savvy people enter leadership roles within accounting firms and on the business side, they are expecting to have anytime access to data, whether that information is internal work product or from those they do business with. Likewise, the customers of these businesses are expecting more mobility, including online account access and mobile payment capabilities.

Technology vendors like Bill.com and Avalara recognized this early on, knowing that once the next generation of professionals was in charge, that they'd move toward systems that are critical to the day-to-day essentials of running a business, and that offered the benefits of the cloud. Bill.com with its automated online payables and receivables management system, takes most of the work out of keeping track of paying vendors and getting paid by customers.

For Avalara, it was finding a way to do something that is virtually impossible, overwhelmingly time consuming and penalty prone to do with an installed system. Avalara's web-based program integrates with sales and accounting systems to provide instant sales tax rate lookups and also cross referencing against a database of taxability rules and regulations for all jurisdictions across the U.S. Both of these companies are poised to take off as the general small and mid-sized business market finds the benefits of SaaS.

For accounting firms, the biggest benefits from SaaS will come from their own staff having total access to firm and client data while away from the office, and from their clients adopting web-based business management systems. With solutions like Xero, FreshBooks, Wave and Brightpearl offering secure online business management, as well as small business solutions from accounting vendors such as Thomson Reuters and CCH, professional accounting firms will have direct access to live data, reducing data entry and errors, and allowing them to provide more accurate reconciliations and write-up services, as well as day-to-day assistance to their clients, also known as virtual CFO services.

After more than 14 years, the cloud has finally moved from being a beneficial platform, to an essential competitive function for businesses and firms of any size. ●

Isaac M. O'Bannon, Editor

Isaac is the Editor for CPA Practice Advisor. Through experience in consumer and professional programs, hardware and peripherals, and knowledge of the public accounting field, he provides reviews and columns focused on helping professionals be more productive with technology. He can be reached at isaac.obannon@cpapracticeadvisor.com..

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REVIEW SECTIONS

BASIC SYSTEM FUNCTION
- Installation ease
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- Industry-specific templates
- Industry-specific features
- Platform support

CORE ACCOUNTING CAPABILITES
- GL/AP/AR functionality
- Sales tax functionality
- Payroll functionality
- Audit trail
- Multi-currency (extra credit)
- Multiple language support (extra credit)
- Multi-location support (extra credit)
- Multiple users

DAY-TO-DAY OPERATIONS
- Sales/point of sale/shipping
- Customer/vendor employee management
- Inventory/purchasing
- e-features
- Remote access

MANAGEMENT FEATURES
- Dashboard overviews
- Reporting
- Security features

INTEGRATION/IMPORT/EXPORT
- Data transfer
- External integration
- Online accountant transfer tool (extra credit)

HELP/SUPPORT
- Built-in support features
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- Support website/documentation
- U.S.-Based support

Ilene Eisen, CPA.CITP, MBA

Ilene is president of ie Solutions (ie-solutions.biz) and an instructor with K2 Enterprises (k2e.com). She can be reached at ilene.eisen@ie-solutions.biz.

Evaluating small business management software is always full of surprises. Some users wonder where to start the process and ask if they really need to change software, upgrade to the current version, or invest in training on the existing application. While there are many ways to evaluate these decisions, I would suggest that you ask your clients the following items as first steps in the process:

- Look at what you are doing outside of the software to support your business needs. What are you doing in all those spreadsheets?
- Are you getting the reports you need to run your business?
- Do you have an external database to track leads and prospects?
- Are you entering information in multiple systems?

The answers to these questions will define your "must have" list. Next, evaluate where the business is going and what do you need to get there. Some possible considerations include:

- What is the one thing that you intended to do each year but just can't find the time to resolve the issue?
- Do you want to increase marketing, organize your office, update internal controls, or gain remote access?
- Will you need to integrate your business management software with other applications?

Let's take a look at the software packages reviewed and examine how they meet the needs of your clients' businesses.

BASIC SYSTEM FUNCTIONALITY – All the packages were reviewed on a PC running Microsoft Windows. *Installation* of each package was completed without issues and each program was up and running in just a matter of minutes. *General Navigation & Ease of Use* was also addressed; all of the products reviewed used a forms oriented interface rather than requiring the user to understand debits and credits (with the obvious exception of journal entries). The appearance of the screen and use of navigation techniques, availability of dashboards and customizable menus varied. *Industry Specific features* were included in some programs including industry specific versions and/or reports. Platform support was also noted, and while all of the products reviewed are available in a version for Microsoft Windows, only a few support other platforms, such as MacOS or the mobile operating systems installed on most tablets and smartphones.

ACCOUNTING CAPABILITIES – All products contained core accounting capabilities such as a general ledger, accounts receivable, and accounts payable functions. Likewise, the applications all had some support for sales tax, including the ability to consolidate rates for multiple jurisdictions, but none were able to support value added taxes like those levied in Canada or the European Union. *Payroll functionality* varied significantly, and while all reviewed products supported in-house payroll preparation, some also offered integrations with other providers, such as payroll service bureaus. *Audit Trail Reporting* was included in all programs with various report options. *Multi-Currency* abilities were included in some programs with various methods for updating rates. Unfortunately none of the programs reviewed included options for *Multi-Language Support*. All of the programs offered *Multi-User* capabilities but few had options within the program for *Multi-Location* support of offsite data entry.

DAY TO DAY OPERATIONS – Significant differences were found in *Sales, Point of Sale, and Shipping* features. Although some programs included advanced features, and add-ons, and others offered integration with other products, and finally, some did not support any specific capabilities. *Customer, Vendor and Employee Management* was included with all products with the ability to e-mail invoices and perform a mail-merge for collection letters. Some products included advanced functionality with Customer Relationship Management integration or add-on products. *Inventory and Purchasing* varied considerably among products, and we considered the major functions in this area, including inventory valuation, multi-location capabilities, bill of materials, and reporting.

MANAGEMENT FEATURES – Many programs included *Dashboard Overviews* to give management a snapshot of the company's status. *Reporting* was also considered to identify the customization capabilities, integration with third party report writers or ODBC access, and support for exporting built-in reports to multiple file formats. Security was also reviewed to determine if individual or role based security. Establishing user rights can be complicated and it was important to understand how these rights were established and if they related to menu options, general ledger accounts or any other type of group.

INTEGRATION, IMPORT and EXPORT – Programs allowed various degrees of import capabilities including lists, budgets, and transactions. Generally batch processing systems allow greater import functionality due to the ability to import to an unposted batch and then use the normal posting procedure. When integrating two systems, it is important to have a pre-built integration or the option to import transactions; therefore both of these options were analyzed. In addition to importing data, integration with third party applications and portals to increase productivity and enhance Customer Relationship Management (CRM) abilities was also considered in this review.

HELP & SUPPORT – All the programs included impressive help and support options. Some programs required access to the internet to read help files, and most had videos available (either on CD or online), and US based telephone support. All of the vendors offered support plans for additional guidance and payroll tax table updates. Additional support was found on websites, user groups, community bulletin boards, and consultant networks.

We have also provided a **SUMMARY & PRICING** section to highlight the features that we feel are most significant for each product. Please continue on to read individual reviews with a list of strengths, potential limitations, star ratings, and best fit of each product reviewed.

Acclivity AccountEdge Pro 2012

2012 OVERALL RATING ★★★★

BEST FIT

AccountEdge is a good fit for many small companies and especially those companies that require multi-location inventory, multi-currency, or need a program that is designed for a Mac. This program is easy to understand and the uncluttered screens are easy to navigate.

STRENGTHS

- Multi Location Inventory
- Mac version available
- iOS Integration
- Multi-Currency

POTENTIAL LIMITATIONS

- No Integration with Shipping Carriers
- No Android Integration
- No Upgrade Path
- Audit Trail can be disabled, but only by administrator-level users

SUMMARY & PRICING

AccountEdge, formerly MYOB is a good small business accounting package for a company that needs multi-warehouse and multi-currency. This package is an especially good fit for a mac user and offers ios integration not found in other small business packages.

AccountEdge is $299.00 ($159.00 upgrade). Annual maintenance which includes tax tables and new versions are $249.00.

800-322-6962

AccountEdge

★★★★	BASIC SYSTEM FUNCTIONS
★★★★½	CORE ACCOUNTING CAPABILITIES
★★★½	DAY-TO-DAY OPERATIONS
★★★☆	MANAGEMENT FEATURES
★★★★☆	INTEGRATION & IMPORT/EXPORT
★★★★	HELP/SUPPORT

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10728927

www.accountedge.com

Red Wing Software's CenterPoint Accounting Software

2012 OVERALL RATING ★★★★☆

BEST FIT

CenterPoint is a good fit for companies that need multi-company consolidations and other strong reporting capabilities. Companies that have a large amount of data entry will benefit from the import feature and the ability to customize data entry screens.

STRENGTHS

- Import/ Export Features
- Inventory Control
- Multi Company Consolidation
- Strong Reporting features
- Customizable Menu & Data Entry Screens

POTENTIAL LIMITATIONS

- Additional software and add-ons significantly increase price
- Limited integration options. Red Wing is in the process of developing an API for interface options.

SUMMARY & PRICING

CenterPoint has solid basic and core accounting functions as well as advanced customization options with the ability to customize templates to speed data entry. The report writing capabilities exceed many other packages. The ability to import transactions adds value for small businesses that use multiple systems. $1,495.00 before additional software and add-ons.

800-732-9464

RED WING SOFTWARE

★★★★½	BASIC SYSTEM FUNCTIONS
★★★★★	CORE ACCOUNTING CAPABILITIES
★★★½	DAY-TO-DAY OPERATIONS
★★★★	MANAGEMENT FEATURES
★★★★	INTEGRATION & IMPORT/EXPORT
★★★★★	HELP/SUPPORT

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10728938

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Sage 50 Accounting (formerly Peachtree)

2012 OVERALL RATING ★★★★★

BEST FIT

Sage 50 Accounting is a good fit for most small businesses, it has an impressive selection of management features, inventory functionality, reporting options, and connected services, to meet the users growing needs. This is a package that will grow with the company as needed and helps the user with a variety services, training, and support options. The e-marketing options help the customer grow and gives small businesses a helping hand in a complicated field of online marketing.

STRENGTHS

- Multiple Inventory Valuation Methods
- Reporting Options
- E- Marketing Features
- Targeted messaging – efficient procedures
- Upgrade to Sage 50 Quantum

POTENTIAL LIMITATIONS

- Single Location Inventory
- Does not support Multi-Currency
- Does not support Mac

SUMMARY & PRICING

Sage 50 Complete, formerly Peachtree Complete has once again proven that it has the feature set and support to help small business meet its needs and continue to grow. It offers options that are strong in the areas of inventory, customer relationship management, reporting, and support. The system will support most small businesses in both their accounting and management needs and offers a seamless upgrade to Sage 50 Quantum if the company needs additional functionality.

Sage 50 Complete Accounting costs: 1-user – $369; 3-user – $669; 5-user – $899.

877-495-9904

★★★★½	BASIC SYSTEM FUNCTIONS
★★★★★	CORE ACCOUNTING CAPABILITIES
★★★★★	DAY-TO-DAY OPERATIONS
★★★★★	MANAGEMENT FEATURES
★★★★★	INTEGRATION & IMPORT/EXPORT
★★★★★	HELP/SUPPORT

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10728948

www.Sage50Accounting.com

A-Systems Visual Bookkeeper

2012 OVERALL RATING ★★★★½

BEST FIT

Visual Bookkeeper is a small business accounting and management system based on A-System's powerful construction-focused flagship product JobView. The primary differences between the two is the inclusion of extensive job-costing functions and workflow utilities in JobView, while both offer strong accounting, GL, AP, AR, sales order management, contact management and built-in payroll capabilities. Visual Bookkeeper, which has been in on the market and in continual development with feedback from users for 34 years, also offers scalability as a business grows.

STRENGTHS

- Intuitive overview screens
- Comprehensive GL, AP, AR, built-in Payroll
- Import of journal entries
- Depth of reporting and one-click export to spreadsheet

POTENTIAL LIMITATIONS

- No multi-currency capabilities
- Moderate inventory
- Limited integrated e-banking options

SUMMARY & PRICING

Visual Bookkeeper is a good choice for a business that needs strong core accounting features, built-in payroll and inventory functions, with options for additional warehousing and point-of-sale capabilities. The support and user conferences will help the user get the most out of the product and create a valuable network of professionals. Pricing for the base version of Visual Bookkeeper starts at $79.95, with the ability to add any number of additional users. The top of the line version starts at $995 and is equally expandable.

Visual Bookkeeper supports an unlimited number of users, each additional user license is $100 for the base version and $250 for the top of the line version and no annual fees per seat.

★★★★½	BASIC SYSTEM FUNCTIONS
★★★★★	CORE ACCOUNTING CAPABILITIES
★★★★½	DAY-TO-DAY OPERATIONS
★★★★★	MANAGEMENT FEATURES
★★★★	INTEGRATION & IMPORT/EXPORT
★★★★★	HELP/SUPPORT

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10729099

800-365-6790 www.a-systems.net

QuickBooks Premier 2012

2012 OVERALL RATING ★★★★★

BEST FIT

This product is targeted at businesses that need one solution that will meet both their accounting and office management needs. QuickBooks Premier has strong accounting functionality, management features, reporting tools, connected services, and document storage.

STRENGTHS

- Improved - Local Document Storage
- New - Update Existing Worksheet in Excel
- Ability to send information to Accountant
- Many Third Party Applications
- Upgrade to QuickBooks Enterprise Solutions
- Industry-specific report templates (It allows online sharing of industry-specific account templates that are created by other QuickBooks users. It will populate your data in one click)

POTENTIAL LIMITATIONS

- Mac Version has less functionality
- Inventory limited to Average Cost
- Limited Import Capabilities

SUMMARY & PRICING

QuickBooks Premier offers users significant value with accounting, office management, integration, document storage and reporting options that will fit the needs of most small businesses. The large number of users has created a huge trained workforce and is also responsible for a huge number of third party applications. If a company outgrows QuickBooks Premier they can easily upgrade to QuickBooks Enterprise with additional functions and capacity.

QuickBooks is an excellent choice for businesses that are looking for one-stop solutions for their accounting and business needs. QuickBooks has enhanced its accounting features with ability to update existing Excel worksheets, document storage, and various add-on features including online backup, merchant services, full service payroll, integration with marketing campaigns, and numerous other services provided by third party providers. Pricing is $399.95 (399.95 upgrade) for a single user.

★★★★★	BASIC SYSTEM FUNCTIONS
★★★★★	CORE ACCOUNTING CAPABILITIES
★★★★★	DAY-TO-DAY OPERATIONS
★★★★★	MANAGEMENT FEATURES
★★★★★	INTEGRATION & IMPORT/EXPORT
★★★★★	HELP/SUPPORT

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10728934

877-683-3280 QuickBooks.Intuit.com

Adagio Offers an Alternative to Off-the-Shelf Systems (2012)

Adagio Accounting was launched in 1999 by Softrak, a provider of Windows-based accounting solutions for small and medium businesses. The suite of accounting modules is designed for professional services and distribution companies and offers an extensive range of products for managing checks, inventory, invoices, time and billing and more.

Adagio's user interface combines the modules to provide the end-user with a system that streamlines the order entry and inventory control process. Users can email and fax invoices and customer statements and generate documents such as invoices, checks and statements.

Adagio modules are available for purchase through an Adagio Consultant Reseller for $1500 per module. Modules come with an optional annual upgrade plan and discounts are usually available when more than one is purchased.

604-736-3741 www.softrak.com

The Power of Collaboration: Will You Be Extinct?

All things in life change. It is inevitable that we evolve. Accounting solutions are no exception and, as with everything else, the web is forcing a new species to evolve while old ones become extinct.

The web is forcing evolution on multiple fronts. All of them, driven by collaboration. Collaboration is at the core of the web and us humans are getting used to it. In fact we are at a point where we can't live without it. While not all of us are tweeting and posting on Facebook every day, many of us are. So what does this new found collaboration mean for accounting software? Ultimately, better tools for you to run your practice and advise your clients thereby increasing the results of both.

There are many accounting and financial solutions online that are leveraging the web to do things we never thought possible. The common theme is they are creating significantly more transparency across the business - transparency with customers, vendors, employees, and accountants. Transparency of information creates more informed and better decisions.

Here are some examples of core accounting functionality that delivers on the power of collaboration and transparency.

- **Accounts Receivable.** In a non-web world, when a customer has not paid their invoice, I don't know whether the invoice was lost in the mail or the customer is ignoring me. With a collaborative web solution, I know if the customer opened the invoice, if they have questions and when they have scheduled a payment. With that information I can make assumptions about when I will receive their payment and that determines when I can pay my bills.
- **Accounts Payable.** In a paper-based process, employees will often lose track of bills that need approval. In fact, I have missed paying many bills because a bill got lost and failed to make it to me. This resulted in angry vendors and late fees. Both things I don't like. And it's why the average cost to process a payable is $38.77. But with the web, I can collaborate real-time with employees from anywhere to understand the status of an invoice and whether or not I should pay it. More transparency and more accountability is a really good thing.

In addition to the above examples, I have seen some very interesting companies recently that are leveraging the centralization of data in even more collaborative ways.

- **Data Entry.** No one likes doing data entry especially when you are looking at a form that was already entered once. It seems and is redundant. Tools on the web are enabling businesses to eliminate data entry by leveraging the open API's from each accounting software company/platform. The web allows someone to create the invoice in one accounting system and to have it automatically be received as a payable in a different accounting system with no data entry. Furthermore, once the payable is paid, the web can automatically update the invoicing party's receivables and cash accounts. Pretty cool, eh?
- **Loans.** Small businesses have the hardest time getting capital. In part it is because each business is unique and hard to evaluate against a portfolio. That's why some startups are focusing on leveraging the data in the accounting system to understand the underlying risk with each business. In fact, there is a company that will make a loan decision and have money in your PayPal account in seven minutes. Yep, you read that right. This is only possible because of the API's sharing the data and then comparing it anonymously across numerous small businesses real-time. This can't be done when the data resides on a PC.

This type of transparency is happening and will have a profound impact on how we each conduct business. It will impact how we collaborate with our customers, employees, vendors and accountants. In short it will impact how we run and advise our businesses.

Ultimately, when you get technology to do things you couldn't do using the old method you increase productivity and hence results. It's how businesses are growing and adding additional locations without needing more staff. It's how accountants are growing their number of clients while keeping their staff the same size.

It's how we will all do business in the future. Those that continue to evolve will find new opportunities and those that don't may find themselves extinct like the dinosaurs.

Rene Lacerte

Mr. Lacerte is CEO and Founder of Bill.com and the former CEO and co-founder of PayCycle. As a third-generation entrepreneur building solutions for accountants, he is uniquely qualified to bring insights from an entrepreneur's and accountant's perspective. He can be contacted at rene.lacerte@CPAPracticeAdvisor.com.

Accounting and Tax To Go

Maintaining a healthy balance between career and family is important for long-term success in both areas. While we can't eliminate the need to access data outside the office, this month's mobile applications ensure that you have the data at your fingertips so that you can provide excellent customer service and accept credit cards in payment for services rendered when away from your office.

QuickBooks Mobile

QuickBooks Mobile is an app for iOS and Android phones which makes customer data in QuickBooks available from anywhere. Users can access either QuickBooks Online data (no additional charge) or 2011 and 2012 Windows desktop versions of QuickBooks with an optional subscription to QuickBooks Connect. The app is a companion to a compatible QuickBooks subscription (not a replacement), and the mobile software provides very limited capabilities for completing customer activities from a mobile device. There is no attempt to incorporate other functions such as bill payment, online banking, or general ledger functions. Users and clients might do well to think of this app as a QuickBooks mobile customer management app, which more accurately states the limited capabilities of this tool.

Although the application is not a replacement for a traditional web-based or on-premises business management software application like QuickBooks Online or QuickBooks Pro, the ability to access customer information and create estimates and invoices from mobile devices with automatic synchronization into QuickBooks is compelling for many businesses.

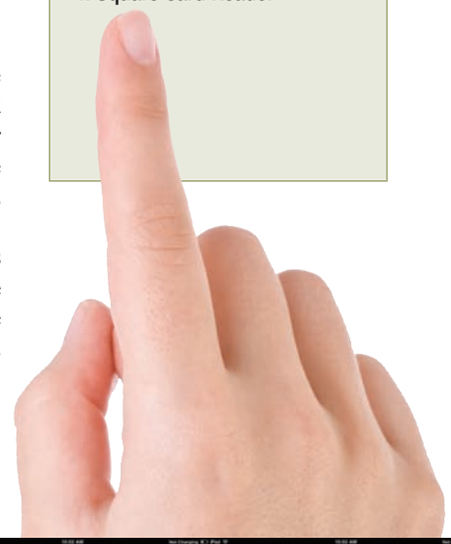
CCH Tax News Highlights and CCH Mobile

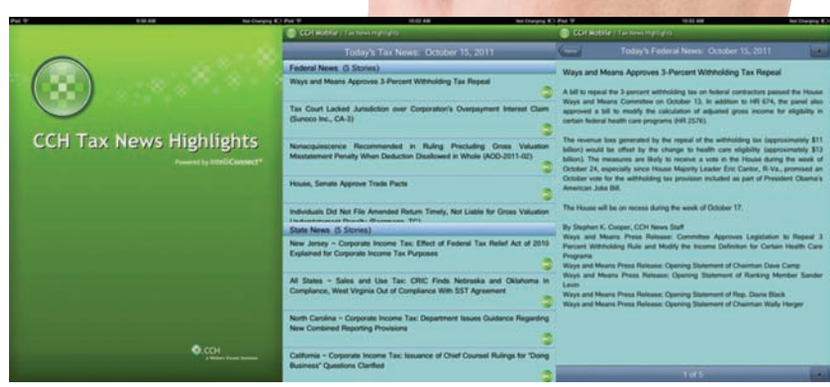
CCH's Mobile apps, CCH Mobile (for IntelliConnect subscribers) and CCH Tax News Highlights (free for anyone) are available for mobile devices running the iOS, Android, and BlackBerry operating systems.

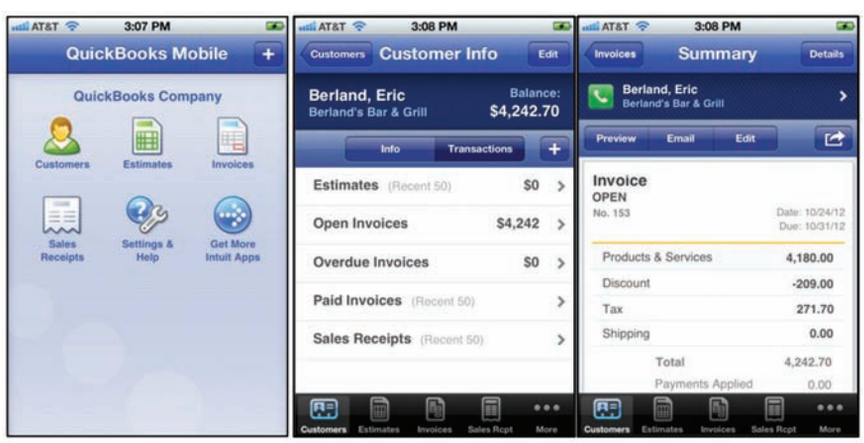
The CCH Tax News Highlights (free) app provides users with five stories on the day's federal and state tax headlines affecting practitioners, as chosen by the CCH/IntelliConnect editorial staff. The Highlights app does not allow for any customization, so every user receives the same

AT A GLANCE

1. QuickBooks Mobile
2. CCH Tax News Highlights
3. Intuit Tax Online (formerly Proline Tax Online)
4. Square Card Reader







ABOVE - CCH Tax News Highlights is a free app which provides users with a daily summary of major developments affecting practitioners, as chosen by the CCH/IntelliConnect editorial staff.

AT LEFT - QuickBooks Mobile offers QuickBooks Online and QuickBooks desktop users access to customer data and transactional data on the go.

Brian Tankersley, CPA.CITP,
Technology Editor

Brian Tankersley is a Knoxville, Tennessee CPA and consultant whose practice is focused on technology consulting and training for accountants. Brian is a nationally recognized speaker with K2 Enterprises (k2e.com), and blogs on accounting technology at CPATechBlog.com. Comments, suggestions, and errata are always welcome, and should be e-mailed to brian.tankersley@CPAPracticeAdvisor.com.

headlines, regardless of their interests or their geographic location. This application is available for devices running all major mobile operating systems (iOS, Android, and BlackBerry).

CCH Mobile is an application for iOS and BlackBerry devices which provides IntelliConnect subscribers with mobile access to customized content from CCH's tax research platform. Unlike the Tax News Highlights app, which provides the same stories for all users, CCH Mobile provides access to content based on user preferences through *Tax Tracker News*. Users can also access common databases and tools from their IntelliConnect subscription, including the Internal Revenue Code and Regulations, Tax Tools and Calculators, and SmartCharts. The application has recently been enhanced to provide better functionality within Intelliconnect on the Apple iPad platform, and some users report that they are using their iPads with SmartCharts for client discussions away from the office. Although an Android version of this app is not currently available (at press time), CCH has a history of adding support for additional platforms when customer and market demands require it. Given the increasing market share of Android smartphones and tablets, one would expect that CCH might expand support for this app to this leading platform at some point in the future.

Intuit Tax Online

Intuit Tax Online is a browser-based Software as a Service (SaaS) application which allows users to prepare tax returns on a personal computer running any compatible full-function web browser. This web-based application can be run on Windows, MacOS, Linux, or ChromeOS, and provides tax preparation functionality similar to that in the Intuit ProSeries Professional tax application. This application is particularly attractive to those who need to prepare ten or fewer tax returns, as there is no software to install, and users can obtain a practitioner-grade application without the fixed costs of many of the traditional pay per return plans.

The Intuit Tax Online mobile application is a tool which allows practitioners to access client data, e-filing status, and PDF copies of returns on their SmartPhone or tablet running iOS. Users can use the client information from the tax application to make telephone calls or send SMS messages to clients, as well as obtain directions from their current physical location (as sensed by the mobile device) to the client's physical address using the Apple iOS mapping functions.

Intuit has made steady progress on the online tax application as well as the mobile app over the last few years. These investments have increased the capabilities of the product to the point where it appears to be a formidable competitor to traditional workflow tax software like Drake, TaxWise, and TaxSlayer. The mobile app provides remote access to data for those with a mobile lifestyle or for practitioners who have limited hours outside of tax season, and is a significant selling point for Intuit's web-based platform.

Brian will be presenting two CPE-eligible webcasts on Aug. 2 through K2 Enterprises. "Workflow Tips for Automating Business Processes," and "Google Apps vs Microsoft Office." More information at www.k2e.com/training/web-based-training.

Square Card Reader

The Square Card Reader app works along with a hardware credit card reader which plugs into the headphone jack of most smartphones and tablets. Although users may not want to leave the reader plugged in when using the smartphone as a traditional phone handset, the card reader is one of the smaller devices at 1" x 1" x ½", and would not be an undue burden when carrying a phone in a purse or briefcase. Mobile payment services like Square are being used by field service professionals like plumbers and lawn maintenance services, and are a good option for accountants to collect fees from customers who may have limited cash flow but plentiful availability on their credit cards. A competing merchant services company, Sage Payment Services, reported significant sales increases in the annual Girl Scout Cookie sales when troops allowed purchasers to pay via credit card using Sage's similar mobile payment platform.

Pricing for mobile payment services can be a factor in deciding which one to use, and although Square does not currently charge a fixed monthly base fee for use of its service, the Company takes 2.75 percent of any collections as its charge for operating the service. The net payment is deposited in the firm's checking account the next day. The service is compatible with most major credit cards, including MasterCard, Visa, American Express, and Discover. While this marginal rate is relatively high when compared to traditional merchant accounts, the lack of a fixed monthly fee may be appealing to users who plan to use the service as a convenience to clients with variable cash flow who have fallen behind in paying their accounting and bookkeeping charges.

Users can sign up for a free account and receive the card reader hardware plugin with no commitment required by creating an account at www.square.com.

ABOVE - Mobile Payment apps like Square, Intuit GoPayment, and Sage Payments make it possible for users to turn smartphones and tablets into credit card terminals with integrated signature capture.

AT LEFT- Intuit Tax Online Accountant allows accounting professionals who prepare tax returns using Intuit Tax Online to access completed returns and e-file status updates from an iOS device.

SaaS and Mobile Solutions are Big Winners at 2012 Innovation Awards

Success in tomorrow's world is reliant upon professionals and their clients having access to the information they need the most when they need it.

As tax and accounting professionals make plans to move their firms forward, certain buzz words continuously show up: SaaS, on-the-go, real-time collaboration, the Cloud, mobile, instant, client portal, mobility. It's obvious that success in tomorrow's world is reliant upon professionals and their clients having access to the information they need the most when they need it. This year's Tax and Accounting Technology Innovation Awards reflected that concept, as all winners were SaaS or mobile app technologies.

"The fact that all of this year's Innovation Award winners are web-based products or tools underscores the growing importance of SaaS solutions for accounting and tax professionals," said M. Darren Root, CPA.CITP, Executive Editor of *CPA Practice Advisor*.

The awards were presented at a reception held in June at the California Accounting and Business Show and Conference in Los Angeles. The Innovation Awards, now in their ninth year, were initially conceived by former Executive Editor Greg LaFollette, CPA.CITP, who is now Vice President of Product Strategy for CPA2Biz, a subsidiary of the AICPA, which received its first award recognition this year.

Winners are selected by *CPA Practice Advisor*'s editorial advisory board and awards committee, which include thought leaders and tax and accounting professionals from across the country. The committee looks for technologies that are new or recently enhanced to help professionals and their clients streamline workflow, increase accessibility and security and improve the client collaboration process.

"When the Innovation Awards were started by Greg in 2004, when he was the Executive Editor, it was a great addition to the profession and vendors, helping identify and reward positive technology trends," Root said in remarks during the presentation ceremony. "What's interesting is that we've now come full circle: Greg started the awards nine years ago and this year, he and CPA2Biz are getting an Innovation Award."

"Thank you, Greg, for starting this great tradition that has come to be respected throughout the profession, and also for giving me something to do on Monday nights," laughed Root, before presenting CPA2Biz with the award trophy for the CPA.com email solution.

While many of today's mobile solutions are created to streamline collaboration between professionals and their clients, several award recipients highlighted the importance of collaboration among vendors as well.

When tax and accounting software and solutions easily integrate into a firm's existing accounting system and each other, it helps tax and accounting professionals more effectively meet the needs of their clients. Erik Asgeirsson, President and Chief Executive Officer of CPA2Biz pointed out in his acceptance speech that vendors also benefit when their solutions can integrate with each other.

"It's important for this community to get together," said Asgeirsson. "We

all are collaborating quite a bit, driving a lot of innovation and a lot of value for a market that's not just supporting accounting firms, but it's also supporting small businesses across America."

"Often times, we wind up partnering together and I think it's really great to see everybody get a little piece of this award," said Mike Sabbatis, President and CEO of CCH, a Wolters Kluwer business, which received recognition for its ProSystem *fx* Document system. "Honestly, from CCH, I'm really happy about getting this award tonight, but to each of you I think there's something to work for. This is a good place to get recognition."

The 10 finalists, including the winners listed below, are: Bill.com Receivables; CCH ProSystem *fx* Document; CPA.com Email Solutions from CPA2Biz; Intuit Online Mobile Payroll; Accounting CS Client Access from Thomson Reuters; AvaTax 1099 from Avalara; BillQuick 2012 from BQE Software; Concur Small Business Edition; Fujitsu fi-6130z and SmartVault Plug-in for Microsoft Outlook.

"From remote access tools and mobile apps that extend a professional's reach to virtually anywhere they are, to programs for payroll, tax, accounting or other tasks that are designed specifically for web-based use, these technologies are increasingly being adapted in forward thinking firms who see the advantages they offer for increasing productivity and maintaining a positive work-life balance," said Root, who is also Managing Partner of Root & Associates, LLC and CEO of the technology consultancy RootWorks, LLC.

2012 Innovation Award Winners

Bill.com™
Chase dreams, not paper.

Bill.Com Receivables

Two years after winning an award for creating a product that streamlined how firms managed their payables, Bill.com is receiving another award for incorporating receivables into their system. Now users are able to manage invoices and incoming payments more efficiently and effectively.

"Winning an award really speaks to Bill.com's focus on listening to customers, really innovating the product and focusing on what matters, which is ultimately the customer," said Bill.com vice president of Strategic Partners Christy Ross upon accepting this year's Innovation Award. "This last year we were really, really focused on this industry and targeting professions."

CCH®
a Wolters Kluwer business

CCH ProSystem *fx* Document

Firms can choose between the SaaS or On-Premise version of CCH's ProSystem *fx* Document for a completely paperless document management solution. With ProSystem *fx* Document, users can search for files by client name, client ID, file name, assigned classes or keywords. Tax returns can be filed electronically, stored according to each firm's record retention policy and marked for automatic deletion upon expiration. ProSystem *fx* Document integrates with other ProSystem *fx* products, allowing for real-time collaboration with clients through the ProSystem *fx* Portal. The document management solution offers users data and document security with password-protected access, file encryption and automatic virus scanning.

CPA2Biz®
A subsidiary of the AICPA

CPA2Biz - CPA.com Email Solutions

CPA2Biz, the marketing subsidiary of the AICPA, now offers CPA.com branded email for all AICPA members for an annual fee. The email solution eliminates the need for generic email providers, such as Google, Yahoo or Hotmail, and offers members an email in that emphasizes their CPA designation.

The CPA.com email solution offers two options - a full email account with send and receive capabilities or a forward-only service. The forward-only option allows professionals to receive messages at a CPA.com email address that is forwarded to an email address of their choice. With this option, users cannot send messages from the CPA.com email address. The email solution is web-based and compatible with Microsoft Outlook and Apple Mail and has 25GB of storage.

intuit

Intuit Online Payroll Mobile

Intuit's mobile app integrates directly with Intuit Online Payroll, allowing firms and small businesses to manage clients, employees, contractors, time and other payroll tasks from anywhere inside or outside of the office. Users can view past paychecks and create new ones. Intuit Online Payroll Mobile allows users to pay staff using direct deposit or paper check and stubs are automatically emailed to workers who signed up for Paycheck Records.

"Our mission is to make employee management as easy as possible for accountants and small businesses," said Katherine Morris, Group Product Manager at Intuit. "We heard our customers loud and clear. They told us they want to be able to run payroll away from their office, to not be tied to an office, not be tied to a computer. In fact, we recently did a survey and 60 percent of accounting professionals and small businesses said that they believe that the future success of their business hinged on the ability to have access to mobile solutions."

THOMSON REUTERS

Thomson Reuters Accounting CS Client Access

The latest version of Accounting CS features an enhanced Client Access database. Clients now have access to a full-featured, web-based program that integrates directly into the firm's accounting systems, giving both clients and firms the ability to work together in real-time.

Features include a streamlined workflow, customizable services, check writing and automated payroll. Users can customize their clients' experience, including controlling what data they have access to and how the client interface looks. Professionals are able to provide the most up-to-date information in a secure environment, including online bank transactions and payroll and W-2 information.

"When the developers set out to build Accounting CS Client Access, being innovative and building something truly unique was the goal, so this award really reinforces that and it will be great to share with everyone back at the office," said Scott Fleszar, Vice President of Strategic Marketing, Tax and Accounting, Thomson Reuters.

Visit www.cpapracticeadvisor.com/10727349 to view a photo gallery from the 2012 Innovation Awards.

By Taija Jenkins, Associate Editor

Taija is the Associate Editor for CPA Practice Advisor, *managing the website and weekly newsletter, CPA Weekly Advisor. She is a graduate of Bradley University. Taija can be reached at taija.jenkins@cpapracticeadvisor.com or follow her on Twitter @TaijaJenkins.*

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CPA Practice Advisor TECHNOLOGY INNOVATION AWARD Spotlight

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For more information about this product

Visit:
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Contact:
877-345-2455, option 2
sales@hq.bill.com

Bill.com Receivables

Bill.com, a cash flow command and control system that manages accounts payable and receivable for businesses, in addition to tax and accounting professionals, launched Bill.com Receivables in March of 2011. As a result, tax and accounting professionals can now easily and efficiently receive payments online, without the fear of losing checks in the mail or the hassle of tracking down invoices or collections. In addition, it fully synchronizes invoices, payments, and customer information with accounting software programs. Bill.com Receivables more than doubles the business processes that can be automated and streamlined with Bill.com. This enables the customer to easily send custom invoices, collaborate with both Bill.com as well as non-Bill.com customers, and receive payments online – anytime, anywhere.

Bill.com Receivables allows tax and accounting professionals to:

- **Email personalized invoices and send automatic reminders:** Bill.com synchronizes invoices and customer information with QuickBooks Desktop, QuickBooks Online, and Sage/Peachtree.
- **Automatically create a branded "payment portal" for each of their customers:** Bill.com makes it easy to send payments and see all sent invoices.
- **Collaborate with customers by exchanging messages and documents online:** Bill.com keeps a complete audit trail of payments and communications.
- **Make electronic payments easy:** Customers can easily add bank account information to make ePayments and set up recurring payments. Payments are transferred directly to users' bank accounts and are synchronized with QuickBooks Desktop, QuickBooks Online, and Sage/Peachtree. No more trips to the bank or duplicate data entries.
- **Get paid via credit card:** In addition to ePayments, customers can now pay via credit card or PayPal. Payments are deposited directly into the user's Merchant bank account or PayPal account where they can then be used to pay vendors directly from Bill.com.
- **Reduce payment costs:** Bill.com ePayments cost only a 49 ¢ flat transaction fee.
- **(NEW) Manage receivables from your smartphone:** View invoices and payments received, track open receivables and send reminders directly from your smartphone.
- **(NEW) Stay on top of current and future cash flow:** All receivable activity is automatically updated into the Bill.com Cash View, streamlining the cash forecasting process.

Bill.com also introduced an innovative capability that allows users to conveniently scan received checks into Bill.com, so that payments can be applied to open invoices. Bill.com will automatically update the invoice status and the accounting system while archiving the check image for future reference. A scan and a few clicks will replace the hassle and excess time spent handling checks. Bill.com is offered to tax and accounting firms exclusively through the Bill.com Accountant Program from CPA2Biz, a subsidiary of the American Institute of Certified Public Accountants (AICPA).

BQE BillQuick 2012

BQE Software designed BillQuick 2012 to address major pain points faced by many accounting firms. While most capture their time and expenses and invoice their clients, they don't have the time or the tools to analyze this valuable data to help identify the bottlenecks in their business. Without such data, firms can make the same mistakes repeatedly which impacts their profitability and performance.

BillQuick 2012 provides cutting edge features to improve a firm's success. Some of these include:

- **New Engagement Center -** Displays easy-to-understand charts and graphs on profitability, billability and efficiency. Professionals can effortlessly monitor and control engagements at-a-glance to see which are running at a loss, have burned through the budget or have overspent their contract. To identify engagements needing attention, simple red dots identify the at-risk engagements. This Center helps managers act rather than react to at-risk engagements.
- **New Collection Center -** Helps professionals identify bottlenecks in the cash flow process and make informed decisions instantly. In addition to simplifying and enhancing collections tracking, this Center includes two metrics that are important to cash flow: Time Entry to Invoice and Invoice to Payment. If the bottleneck is in Time Entry to Invoice, it requires an action such as changing the billing frequency or billing practices. If the bottleneck is in Invoice to Payment, the business owner can re-write engagement letters, fire the client or add late fees to future agreements. This new approach of analyzing the elements impacting cash flow is unique to BillQuick.
- **New Report Center -** A perfect example of how smart programming can make difficult tasks easy. Once a report is selected, BillQuick's intelligent algorithm analyzes it, figures out the applicable filters, provides a list of similar reports, and displays an instant preview of the report. BillQuick also remembers the last filters applied the next time you run the same report. This smart technology works with all reports including the ones created by users themselves! In addition you can Memorize reports and filters, tag your Favorites, and rerun previous reports with a click. Considering that an average BillQuick user runs over 1,000 reports per year these features are a huge time-saver.
- **Hybrid Cloud Model -** Allows desktop, browser and mobile app to communicate in real time with a cloud server. This innovation involved developing custom protocols for syncing data from various platforms and devices in a seamless and frictionless way. Now within one firm the tech savvy users can move to the cloud while others continue using the desktop application.

Traditional time billing programs end with client billing, but BQE has taken the traditional time and billing concept and added a significant business intelligence model, without requiring any additional data entry.

SPONSORED CONTENT

CPA Practice Advisor TECHNOLOGY INNOVATION AWARD Spotlight

CPA2Biz®

A subsidiary of the AICPA

For more information about this product

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Dee Feng

1.212.596.6243

CPA2Biz – CPA.com Email Solutions

CPA2Biz is the business and commercial firm development arm of the AICPA, helping members find technologies and providing educational opportunities to improve productivity.

Among the newest offerings from CPA2Biz is the CPA.com professionally-branded email solution. While the concept is fairly simple, this new solution offers thousands of AICPA professionals an easy way to retain a professional email account that reflects their credential, while also providing portability.

This is especially valuable to firms that don't want to manage domain names or mail servers, but also don't want to rely on a consumer email service such as Gmail, Yahoo!, MSN or AOL, since email addresses with those accounts don't reflect the professionalism clients may expect.

Less senior professionals within existing practices will also find the service useful, allowing them to explore career opportunities outside their current employer, or even to prepare for starting their own practices, without using their firm's domain or a consumer-level service.

Under both of the available versions, a professional receives their personal email address (such as BobSmith@CPA.com).

FULL FEATURED VERSION OF CPA.COM EMAIL

Built on the Google Business Solutions platform, the full-featured version of the email service is easy to set up and can be accessed through Microsoft Outlook, Apple Mail, webmail, and an array of mobile devices.

It comes with 25 gigabytes of storage, full Contacts and Calendar functionality, and anti-spam and antivirus protection. Unlike Gmail, accounts powered by Google Business Solutions are backed by service level agreements that guarantee 99.9 percent uptime.

FORWARD-ONLY OPTION

Professionals can also choose a forward-only option that automatically transfers messages sent to their CPA.com email address to another email address that the user may have as a primary account. CPA2Biz takes care of all the setup and technical details.

Pricing for the full-service account is $95.95 a year. The forward-only option is $29.95 a year.

While CPA.com email is a perfect solution for sole practitioners and smaller firms, it's also drawn considerable interest from AICPA members in business, industry and government. The service offers a reliable, secondary email address for CPAs throughout their career.

NEW CPA.COM EMAIL SERVICE

EXCLUSIVE

TO CPAs WHO ARE

AICPA MEMBERS

Now you can enjoy the prestige of having your very own individually-branded CPA.com email address. Whether you're a sole practitioner, work at a large firm or in business & industry, this professional email address will add immediate value to your career by reinforcing your CPA designation and providing you with a distinct competitive edge.

Register for your personalized CPA.com address now at cpa.com/email.

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CPA Practice Advisor TECHNOLOGY INNOVATION AWARD Spotlight

CCH a Wolters Kluwer business

For more information about this product

Visit:
www.CCHGroup.com

Call:
800-PFX-9998

CCH, a Wolters Kluwer business – ProSystem *fx* Document

ProSystem *fx* Document minimizes the costs associated with managing the full range of documents found in an accounting practice — from tax returns to client correspondence, employee records and email — reducing the costs associated with creating and storing paper documents. By having all documents in one central, searchable repository, professionals can deliver better client service by minimizing time spent searching for binders or pieces of paper.

In addition to increased efficiency and cost savings, ProSystem *fx* Document also provides the risk mitigation needed for document storage and retention. Professionals can comply with regulations and standards, all in the background of their day-to-day work, and provide their firm with:

- Automated document retention capability that lets professionals implement a consistent firm-wide retention policy.
- Streamlined workflows, resulting in improved productivity.
- Secure, remote, 24/7 access to client files.
- Freedom from dependence on physical pieces of paper. Storing documents in digital format provides the ability to back up all client files. When properly stored, this backup will keep firm's content safe in the event of a disaster.

Finding files with ProSystem *fx* Document is fast and easy. Client document and word searches are combined on one screen, letting professionals search using any combination of parameters.

In addition to storing documents, ProSystem *fx* Document helps better manage client correspondence and email by allowing professionals to:

- Drag and drop emails and attachments directly to ProSystem *fx* Document from within Microsoft Outlook.
- Enhance collaboration within the firm by saving pertinent client emails to ProSystem *fx* Document, making them accessible to everyone.
- Ensure compliance with regulations related to email retention and destruction.
- Manage the size of exchange servers by archiving emails in a secure, searchable location.
- Eliminate risks related to local hard drive crashes or laptop thefts by storing emails outside of archived email storage.

Maximize productivity through integration with other ProSystem *fx* Suite products to allow staff to spend less time looking for the information they need and more time focusing on getting the job done.

For example, ProSystem *fx* Document users can:

- Scan, organize and bookmark client source documents using ProSystem *fx* Scan, then automatically import them to ProSystem *fx* Document in one step. Client source documents are then searchable and accessible to everyone at the firm.
- Easily move or copy files to or from ProSystem *fx* Engagement, allowing a firm instant access to client deliverables and providing improved management of permanent files.
- Print returns directly from ProSystem *fx* Tax to the correct client in ProSystem *fx* Document.
- Enhance communication both within a firm and with clients with ProSystem *fx* Document tightly integrated with ProSystem *fx* Portal. Save time and money with this secure method of exchanging information and collaborating with clients.

ProSystem *fx* Document allows firms to gain a competitive edge by helping to reduce the costs associated with creating, storing and managing paper documents, while achieving dramatic improvements in workflow and client service.

SPONSORED CONTENT

CPA Practice Advisor TECHNOLOGY INNOVATION AWARD Spotlight

Concur®

For more information about this product

Visit:
www.concur.com/cpa

Contact:
Concur Advisor Program Manager
425-497-6365
advisor@concur.com

Concur – Concur Small Business

A shoebox and a spreadsheet are pretty inefficient ways to manage expense reporting. Small businesses have traditionally used a manual process to manage their system –paper receipts, worksheets and hours of data entry. And that's if they track their expenses at all.

Concur Small Business edition allows small businesses to toss those receipts and improve productivity in the process. Their fully automated mobile expense reporting tool transfers expense reporting data into your accounting system, and includes a direct integration with Intuit QuickBooks.

The system also includes tools for setting company expense policies, spending limits, travel restrictions and other factors, with routing of approvals and sign-offs to appropriate managers. This leads to better visibility, reducing the risk of fraud and an increasing compliance with travel policies and tax laws.

Because so many small business travelers are on the go, Concur's mobile application automatically captures transaction data from both personal and corporate credit card charges, making them available for import into expense reports from anywhere, at any time. The result is an efficient and productive application that allows people to create, submit and approve expense reports all over the world either online or with their Android, BlackBerry, iPhone or iPad devices.

INNOVATIVE PROGRAM FOR ADVISORS

This year, Concur enhanced the Small Business edition even further with the Concur Advisor Program. The program is an innovative opportunity for individual professionals and accounting firms to partner with Concur, the market-leading provider of expense reporting technology.

The program encourages accounting professionals to ultimately grow their practice with a new focus in the growing field of travel and expense management. Members receive a free Concur subscription and may also obtain CPE credits, learn about IRS reporting rules and access Concur's specialized support, all in the name of professional development in the robust field of small business accounting.

SPONSORED CONTENT

CPA Practice Advisor TECHNOLOGY INNOVATION AWARD *Spotlight*

Thomson Reuters – Accounting CS Client Access

Accounting CS from Thomson Reuters is the vendor's next-generation combination of write-up, trial balance, compliance and client-side bookkeeping. The system is designed as a complete firm accounting solution, with the ability to extend web-based accounting capabilities to business clients, so that their data lives on the same central database used by the firm.

The program includes after-the-fact payroll functions, and has an available add-on for processing live payroll. Accounting CS also integrates with the other CS Professional Suite applications, including document management, practice management, fixed assets, tax planning and tax compliance.

The latest version of Accounting CS features a series of major enhancements to the Client Access feature, offering clients and firms an entirely new way to work and collaborate.

Newly enhanced Accounting CS Client Access offers firm clients a full-featured small business accounting application with an unprecedented level of integration between the client and the accounting firm. It creates a single, seamless, automated workflow between accounting firms and their clients, dramatically improving efficiency and eliminating the need to integrate with cumbersome third-party applications.

Accounting CS Client Access automatically shares deposits, checks, payroll, and other transactions as they are entered on the client end, eliminating periodic transmittals and other time-consuming data collection steps. The firm enjoys a higher level of control over client accounting processes, resulting in smoother interactions and time savings for both the firm and the client.

On the client's end, Accounting CS Client Access automates day-to-day accounting processes. Accounting CS also turns static payroll, accounting, accounts payable, and financial statement reports into live online documents that update automatically with up-to-the-minute data and can be accessed anytime.

Accounting CS Client Access also gives firms the option of offering clients a suite of cloud-based office productivity applications, including File-Cabinet CS, Microsoft Word, Excel, and Outlook. This helps firms expand their relationships with clients by becoming a trusted technology provider.

The firm maintains complete control over the accounting process, including which features and reports to make available to each client. In addition, the firm can customize Accounting CS Client Access to each client's needs by choosing from several feature options that can be mixed and matched for each client. These options include:

- **Client Check Writing** automates check writing and daily bookkeeping functions for clients to help them keep track of their bank account balances and quickly process checkbook transactions.
- **Client Payroll** automates payroll functions for clients, including payroll processing, check writing, and direct deposit, streamlining the payroll process and allowing the firm to focus on higher-level tax compliance issues.
- **Client Accounting** makes it possible for clients to process accounts payable and accounts receivable functions in-house, generate sophisticated reports, and schedule payments. Accounts Payable is available now, while Accounts Receivable will become available in fall of 2012.

Accounting CS Client Access results in dramatic time savings for both the firm and the client, closer firm-client relationships, better client service in less time, and improved consistency across clients.

THOMSON REUTERS

For more information about this product

Visit:
www.cs.thomsonreuters.com/accountingcs

Contact:
800.968.8900
CS.Sales@ThomsonReuters.com

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CPA Practice Advisor TECHNOLOGY INNOVATION AWARD Spotlight

Intuit Online Payroll Mobile

The ability to sever ties to a computer or an office is becoming increasingly important to professionals due to the increased productivity and efficiency that mobility brings. More and more business owners and accountants are looking for flexibility and convenience when trying to run their business on the go.

As the No. 1 payroll provider in the U.S. with more than 1 million customers, Intuit developed the Intuit Online Payroll Mobile app as part of its Online Payroll service to help accounting professionals pay their clients' employees on the go and in three easy steps. The mobile app works with iPhone, iPad, iPod Touch, Android and Kindle Fire and enables accounting professionals to manage their clients' payroll while out of the office.

IOP Mobile's detailed features include:

- **Pay All Clients' Employees & Contractors:** Covers both hourly and salaried workers, and Contractor payments.
- **Preview Paychecks:** Provides a comprehensive view of how much each employee is being paid before running payroll.
- **Look up Employee & Contractor Information:** Easily access worker data.
- **E-mail Confirmation:** Sends a confirmation e-mail to employers and accountants. TIt automatically sends a message to employees signed up for PCR letting them know that their stubs are accessible online.
- **Flexible Payment Options:** Pays employees with direct deposit or manual paycheck printing.
- **View Past Paychecks:** It provides access to all past pay stubs for the year.
- **Manage Clients:** Lets accounting professionals choose the client for whom they will run payroll.
- **Free Support:** Provides free phone support.
- **Data Security:** Uses the same encryption technology used by many banks to protect information from any unauthorized access while being transmitted.

"Unlike my computer, my phone is with me all the time," says Karen Wagner, bookkeeper at Wagner Communications, Inc., Danville, Ill. "Now, when I am traveling and it happens to be pay day, I simply log into the Intuit Online Payroll app from my iPhone, type in the hours and approve and all my employees are paid. It's easy to use and run payroll from my iPhone – even easier than doing it from my computer. I spent my vacation in Florida and still paid my employees using my phone on their scheduled pay date."

With just a few taps, they choose which client's payroll to run, enter employee hours, review and approve, and instantly pay employees. All paycheck details are automatically reflected in the user's Intuit Online Payroll or Intuit Online Payroll for Accounting Professionals account.

The Intuit Online Payroll Mobile app is available for free download via the App Store Google Play , Amazon or iTunes. To use the app, users must already subscribe to Intuit Online Payroll, QuickBooks Payroll for Mac, Intuit QuickBooks Online Payroll, Intuit Full Service Payroll or Intuit Online Payroll for Accounting Professionals.

Learn more and try a FREE demo by downloading the free app.

intuit

For more information about this product

Visit:
accountant.intuit.com/payroll

Phone Contact:
1 800-365-9618

How to Weave Social Media Into Your Firm's Marketing

Whether you already use social media or haven't started yet, the odds are that you're doing some things offline or by email that can be leveraged into social-media activities. Integrating your offline marketing activities with your online ones helps you get the most out of both types.

Start with an inventory of all your current offline activities, plus basic email communications.

What are you doing now?

List what you do and for whom you do it (by audience or group type), answering each of the follow-on questions:

- **Email alerts and newsletters:** What communications do you send? How often? Who sees them?
- **Print newsletters:** How do you distribute? How often? To whom?
- **Print articles:** Do you guest author? For which publications and audiences?
- **Case studies:** How do you use them? Who else should see them?
- **Surveys:** Do you conduct industry surveys? What information do you collect? Who else would benefit from the findings?
- **Memberships:** Are you involved in trade, peer, community, or charitable organizations? Who else belongs? Do they have online forums?
- **Sponsoring activities:** Who are sponsorships visible to? What else will they care about?
- **Attending events or seminars:** What events do you attend? Who else attends?
- **Speaking:** Do you do outside speaking? To whom? Does your company host events?
- **Media appearances:** Are you a resource or quoted expert for TV, radio, print, or online media?

Experience shows that bridging these activities together creates greater results. And now, bridging them with your social-media channels gets you incredible visibility, demonstrating your credibility to a much broader audience. Here are a couple of examples:

Michelle Golden

Michelle is a growth and profitability strategist. With her deep knowledge of firm operations and sharp observation skills to quickly grasp a firm's nuances, she guides practitioners toward improved profitability and stronger, healthier cultures. She focuses on strategic consulting and facilitation around long- and short-term planning, positioning and pricing, messaging, and communications (both online and off).

PRESENTATIONS

When you agree to give a presentation for clients or a trade association, don't let your hard work go to waste by just showing up and talking. Instead, build interest in advance:

- Turn your speech into an article, too.
- Load the article on your website, cross-referencing the upcoming event and linking to the registration page.
- Post about the article and event on your blog (or if the article is shorter than 1,500 words, post it directly to your blog instead of your website).
- Distribute the article and event-registration info to relevant email groups.
- Post status updates (with links to your article) on LinkedIn, Twitter, and Facebook.
- Create "events" in LinkedIn or on your company's Facebook page and invite your connections to the events. When they RSVP, the event will be automatically promoted to all their contacts, too.

DURING:

- Video- or audio-record the session.
- Have a good photographer capture speakers and attendees during the session and while networking.
- Have someone sit in to write a media-style recap of the event that includes interviewing attendees about their most valuable takeaways.

KEEP THINGS ROLLING AFTER YOUR PRESENTATION:

- Upload your slide deck and handouts onto SlideShare (attract new subscribers through the keywords that are automatically indexed from your presentation).
- Upload videos to YouTube, audio to iTunes, and photos to Flickr.
- Embed onto your blog or website the SlideShare and YouTube or podcast of the presentation along with photos and the written recap.
- Distribute your summary post to all attendees, as well as to people who were invited but couldn't make it.
- Tweet and post to LinkedIn and Facebook about the summary post.
- Include the SlideShare link, recordings, and session-recap posting in a broadcast email to relevant recipients.

ATTENDING EVENTS

You can even leverage just being an attendee at a seminar.

IN ADVANCE:

- Ask for the event's Twitter hashtags (such as #AICPA or #pstech) and tweet that you're going.
- Follow discussions (search for the hashtag) to find out about any "tweet-ups" (in-person gathering of Twitter users) to meet others.
- Check Facebook and LinkedIn event pages, then Like, Join or RSVP the events or related groups to begin relationships.
- Friend and follow others who use the event hashtag.

ONSITE:

- Live-tweet helpful points from sessions using the hashtag in each tweet — retweet (RT) others' best session tweets.
- Mention people you meet or learn from using their @name.
- Video record (using your smartphone on a small tripod) some brief two-to-three-minute interviews of speakers or "experts" (in a quiet corner) to later post on YouTube and distribute on your blog, Twitter, Facebook, or by email.
- Take photos of yourself with others, especially clients and industry leaders, and share on Twitter and Facebook.

Similarly, your organizational and community involvement and sharing of useful information all provide occasion to meet worthwhile people, promote others, and be of service to people who will benefit from knowing you.

Integrated marketing is your key to doing fewer things better. Find the untapped opportunities for greater effectiveness in what you're already doing. And don't underestimate the power of the social web to further your reputation as a skilled, credible professional.

Watching the Ball – IT Concerns for SaaS, Hosted and In-House

Security of client information has always been a top concern for Information Technology (IT) teams. Even with a security focus, education and the right tools, security is frequently weak. If your IT team takes their eye off the security ball, you will have a problem. You must also watch the ball for new methods of using applications including Software as a Service (SaaS), hosting and the more traditional approach of running applications in-house on your own network.

It is wise of the management team to verify the internal IT team or outsourced IT team selected strategy. With SaaS applications still representing a relatively new development in IT strategy, we believe a checklist methodology may help you communicate your IT concerns. The following lists are intended as a starting point, not as a comprehensive assessment, and there are certainly other articles discussing the benefits of SaaS or hosting applications that are worth additional review.

Randy Johnston

Mr. Johnston is executive vice president and partner of K2 Enterprises and Network Management Group, Inc.
He is a nationally recognized educator, consultant and writer with over 30 years' experience. He can be contacted at randy.johnston@cpapracticeadvisor.com.

SaaS Concerns

Running your applications through a browser has potential benefits as well as weaknesses for your firm. Examples of the benefits include: the software remains up-to-date, rapid deployment, ease of access from multiple locations particularly where a browser can be used, known recurring costs and more. Possible weaknesses include: poor performance, lack of customization, difficulties with integration, outages beyond your control, and difficulties in downloading your data including the loss of history during conversions.

IT Concerns for you to discuss with your team include:

- **Service Level Agreement (SLA) guarantees** – What is the contracted commitment of availability? What is the consequence if this standard is not met?
- **Security of the data** – How is access protected? Is it simply a user ID and password? What happens if the user ID and password is compromised? Is any data left behind from the browser session? Is any data stored locally on the machine or device used?
- **Compatibility with browsers** – Although compatibility is improving with more use of HTML5 and less use of Flash in applications and web sites, there can be notable differences in experience if products are run in different versions of web browsers or in different web browsers. For example in the Microsoft browsers Internet Explorer 8, 9 or 10, there are notable technical differences and user experiences. The complications become more pronounced as Google Chrome, Mozilla FireFox and the Safari browsers are added to your mix. How does your organization support, test and protect the organization?
- **Speed issues** – What is the organizational plan to deal with unforeseen performance issues? Most browser based applications run consistently, but if there is an issue, how is it resolved? Speed and compatibility issues are frequently beyond the control of your IT team to resolve. What will you do if this is an issue? Unfortunately, there have been a number of providers of SaaS applications that have gone through growing pains and have had trouble providing sufficient performance and scalability. Some routing

IT IS WISE OF THE MANAGEMENT TEAM TO VERIFY THE INTERNAL IT TEAM OR OUTSOURCED IT TEAM SELECTED STRATEGY.

problems across the internet sometimes can't be resolved by either the provider or your IT team … the issues lies with a third party.

- **Upgrades** – A benefit of SaaS applications is that the provider keeps the software up to date. How will you keep your people trained on the application, particularly when there is a major change in the user interface? This year alone we have seen multiple upgrades that did not seem like a step forward, and the user interface change was particularly disruptive.

Hosted Concerns

Hosting applications can eliminate some traditional IT problems, but may create issues at the same time. For example, QuickBooks hosting is popular, and it is convenient to not go through the installation or upgrade process. The cost of hosting can frequently be passed on to clients, making the option even more attractive for a firm.

Like SaaS, hosting can provide benefits including: software updates are applied by the hosting vendor, hosting makes remote access easier, and infrastructure expenses such as servers, backups and other upgrades may not be required. Possible weaknesses include: poor performance, restrictions on integration, outages beyond your control, and restrictions placed on application use.

IT Concerns for you to discuss with your team include:

- **Certifications** – Is the hosting company certified? Has the hosting vendor met minimal standards such as the Service Organization Controls (SOC) in SSAE 16?
- **Licensing** – Do the applications we want hosted have any restrictions in their end user license agreement (EULA)? How is the software licensed? Does the hosting company provide the licensing? Do we?
- **What protects our data?** – Is the data backed up and copied off-site? Is the security set up to prevent other firms from seeing our data? Unfortunately, this problem has occurred more than once this year by well-known hosting companies.
- **How do upgrades occur?** – Does the hosting company install new applications or updates? What is the charge for this? How frequently are the updates made?
- **End-user support** – How do issues with applications get resolved? What happens for after-hours issues? What are the charges?

In-House Concerns

Using local area networks and personal computers for business has only been done for around 30 years. Although more time has allowed us to be more comfortable with in-house deployments, there are benefits and risks here, too. In-house implementations have benefits including: software updates can be applied on your schedule, remote access support for specific devices or needs can be implemented, costs are more likely to be lower, integration can be comprehensive and with today's managed service options, experts can securely provide services on your system from afar. Possible weaknesses include: need to upgrade regularly, poor local support, lack of understanding of your applications, lack of expertise in a technology you need, security shortfalls, and catastrophic failures at your location.

IT Concerns for you to discuss with your team include:

- **Technology Plan** – What is our technology strategy and tactics? What is the budget for our activities?
- **Business Continuity and Disaster Recovery** – How have you covered the IT portion of our firm-wide BC/DR plan? Can you show me your IT documentation?
- **Single Points of Failure** – What technologies do we have where failure of a single item could disable us?
- **Security** – How can we be assured that we have adequate protection? What is your plan for firewall maintenance? How is data encrypted in motion and at rest?
- **Backup** – How is our in-house IT protected? What is the data backup strategy? How do you know it is working? Who is your backup in case something happens to you?

Most of the IT concerns for in-house have to be addressed whether you are only in-house, or use some hosting or SaaS applications. As you have probably perceived, the IT concerns listed in all three categories barely scratch the surface of what has to be considered. There are many sources for good IT checklists, but the key formula in each case is applying your knowledge and business needs to the list. If you'd like to discuss your needs directly, it would be a pleasure to do so. The most important thing to do is to act and make a plan that can guide you now and in the future. ●

AT A GLANCE

SAAS CONCERNS

1. Service Level Agreement (SLA) guarantees
2. Security of the data
3. Compatibility with browsers
4. Speed issues
5. Upgrades

HOSTED CONCERNS

1. Certifications
2. Licensing
3. What protects our data?
4. How do upgrades occur?
5. End-user support

IN-HOUSE CONCERNS

1. Technology Plan
2. Business Continuity and Disaster Recovery
3. Single Points of Failure
4. Security
5. Backup

UPCOMING SPEAKING ENGAGEMENTS FOR RANDY JOHNSTON

- **July 17th** Small Business Technology Road Show, Tampa Marriott Waterside Hotel & Marina
- **July 18th** Small Business Technology Road Show, Hilton Garden Inn Atlanta Airport Millennium Center
- **July 19th** Small Business Technology Road Show, Hilton Newark Penn Station
- **July 24th** Small Business Technology Road Show, Double Tree by Hilton Dallas near Galleria
- **July 25th** Small Business Technology Road Show, Hyatt Lisle near Naperville
- **July 26th** Small Business Technology Road Show, Denver Ramada Plaza Hotel and Conference Center
- **July 31st** Small Business Technology Road Show, Radisson Hotel Seattle Airport

REVIEW SECTIONS

BASIC SYSTEM FUNCTIONS
- General navigation/ease-of-use
- Designed for accounting professionals
- Scalability

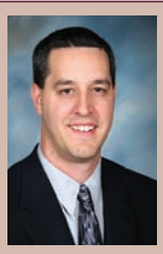
TIME MANAGEMENT CAPABILITIES
- Timesheets, timers, multi-staff views
- Project management
- Contact management & marketing
- Approvals/sign-off process
- HR tracking (PTO, sick, benefits)

INVOICING FUNCTIONS
- Expense tracking options
- WIPs, budget-from-estimate
- AR management
- PO management
- Customization

MANAGEMENT FEATURES
- Dashboard overviews (AKA Snapshots)
- Managerial reporting analysis
- Security features/user roles

INTEGRATION & DATA MANAGEMENT
- Data output options
- Integration w/payroll and professional accounting systems
- e-Functions: Invoicing, payment, remote access

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



Steven Phelan, CPA

Steven is a tax manager for North Bay Associates, a family group office, and manages a tax and technology consulting practice in Oklahoma City. He has served on the Board and has recently served as chairperson for the Oklahoma Society of CPAs' (OSCPA) Technology Committee. Steven has given numerous presentations and training sessions on various technology topics for the OSCPA and other organizations throughout Oklahoma.

Are You Efficiently Managing Your Practice?

Practice management and time management are often viewed as similar functions within an accounting firm. On a surface level view, both will track time and run a variety of time based reports for billing and invoice purposes. On a deeper level, however, practice management software provides many more tools to help efficiently and effectively manage an accounting firm. This additional level is crucial, especially as firms add service offerings beyond traditional tax and accounting services.

The backbone of the accounting profession is built on deadlines, with each month including a deadline for financials, tax returns, payroll, sales tax reports and host of other tasks. At the forefront of each practice management solution is project management. With the appropriate practice management software, tax & accounting professionals have the ability to setup and track these projects and deadlines within each client. This, in turn, should lead to a greater efficiency in balancing workload and workflow within the accounting firm. Partners and managers simply run appropriate reports that show the work that is in, the current status of that work and if clients need to be contacted for further information.

Another key feature of practice management software is the customer relationship management (CRM) functions built in. Although not as full featured as dedicated CRM solutions, practice management solutions offer the baseline tools necessary for a CRM solution. Most solutions are also built on the Microsoft SQL database platform, which lends to stability and offers scalability on a unified database platform. This allows client contact data to be centrally stored and most systems will also synch data between Outlook and Exchange. From here, direct client communication via email can be accomplished directly within the practice management software.

Each of the practice management solutions reviewed features prevalent use of dashboard technology. Although each vendor treats the dashboards differently, the idea remains the same – upfront and easy-to-read information. Each dashboard focuses on providing partners and managers with quick answers to common questions and report data through a series of graphical charts. Most of the dashboards allow for some customization to further enhance the information needed on a firm-by-firm basis. These dashboards also provide partners and managers tools to monitor staff progress and billable hours as well as keep a pulse on any outstanding billing issues.

One key difference between each of the reviewed products is the way product integration is implemented. Each vendor views the importance of integration differently and this leads to some inconsistencies. In some instances, the practice management solution does not fully integrate with other software within the same suite lineup of products. Most of the solutions reviewed are limited to integration with tax solutions and accounting general ledger data. Although vertical integration is not usually necessary with project management, it does break the consistent feel within the respective product suites. These integration differences also allow for each practice management solution to be used as a standalone product. This further allows accounting firms to choose a product that best fits their needs based on current workflow and client makeup.

One area that has not been widely adopted by practice management software is the extensive use of cloud

technology. Of the products reviewed, only one solution, Practice CS from Thomson Reuters, is available as a cloud solution. All other products reviewed are wholly available as desktop solutions. Mobility is another area that is not widely supported. With so many professionals working in nontraditional locations, staff members may find themselves outside the office for days at a time. Most professionals have also become reliant on smartphone devices for communication. Tablets have also exploded in popularity over the past year and are making their way into the business process. Most support for mobile technology is limited to synching business contact and calendar information. Although this synching is helpful, it is oftentimes dependent on Microsoft Exchange technology which many small businesses may not have implemented.

Practice management software provides a multitude of tools to manage time, projects and staff, all housed in one software solution. Each of the products reviewed may be used as a standalone product regardless of the tax and accounting solutions currently implemented. The reviewed practice management solutions also provide entry-level CRM capabilities to keep track of current and potential clients. With the summer months coming up, now may be a good time to assess some of the efficiencies within your accounting practice and potentially gain some new clients. ●

Commercial Logic APS Advance

2012 OVERALL RATING ★★★★☆

BEST FIT

Larger firms needing customized practice management integration with existing software architecture.

STRENGTHS

- Offers strong customization options to adapt to most firm needs
- Microsoft SQL platform offers user scalability and unified reporting platform
- Program built around project management instead of time management functions
- Multiple modules available to further enhance management and reporting

POTENTIAL LIMITATIONS

- No current cloud offering for US based solution
- Smaller firms may not yield full benefits offered through system

APS Advanced Practice Management is a business intelligence system offered through APS, a company based in Sydney, Australia. APS Advanced Practice Management is the central product offering within the APS suite of products designed to make accounting and consulting firms more productive. Commercial Logic, Inc is the sole provider of APS products in North America and handles all sales and first line customer support. APS customer support is also available to North American clients from London, Sydney, and Auckland. Multiple modules are available and APS Advanced Practice Management is designed as one of the most customizable practice management solutions in the marketplace today.

SUMMARY & PRICING

APS Advanced Practice Management offers strong customization options and is a system designed to conform to accounting firms of any size and client focus. APS Advanced Practice Management is best suited for accounting firms with 25 or more employees. Firms under this threshold may not yield all the benefits offered through the system. Since APS Advanced Practice Management is built on the Microsoft SQL platform, the system is fully scalable to firms employing a few dozen employees to those employing over 1,000. Pricing for the core module, including all time, billing, staff management, client contact management and workflow features starts at $300 per user. Additional modules and customization options are available and are generally priced per user dependent on needs.

commercialogic
The Practice Management People

★★★★★	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/10726584

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Thomson Reuters Practice CS

2012 OVERALL RATING ★★★★½

BEST FIT

Firms of all sizes looking for a comprehensive solution offering project management and workflow capabilities or users already in the CS Professional Suite product ecosystem from Thomson Reuters.

STRENGTHS

- Comprehensive project management capabilities
- Available as a cloud solution
- Strong reporting capabilities, including filtering and fully customized reports
- Multiple dashboard capabilities

POTENTIAL LIMITATIONS

- Requires purchase of numerous modules or other CS Professional Suite products to achieve full functionality
- Support requires separate maintenance contract

Practice CS is the practice management offering within the CS Professional Suite lineup from Thomson Reuters and includes extensive tools needed to manage an accounting practice. Practice CS is offered as a core product with three separate add-on modules. Each module includes functions to enhance data entry and reporting as well as incorporating quality customer relationship management. New for 2012 are enhancements to the Mobile CS solution allowing direct time and expense entry from Apple iOS and Google Android devices and a new file transfer capability through NetClient CS.

SUMMARY & PRICING

Practice CS offers a comprehensive system designed to manage and track multiple facets within an accounting firm. Although built for small to medium size firms, Practice CS is fully scalable from a sole practitioner to firms employing 1,000 or more employees in multiple locations. As part of the CS Professional Suite, Practice CS offers strong integration with fellow CS Professional Suite products, but also works well as a standalone product. Pricing for the core time and billing module starts at $1,875 for a five user license. The client, project and staff management add-on modules start at $475 per module and are not priced based on number of users. Mobile CS can be downloaded for free with sample data, and used with Practice CS for a low monthly fee.

THOMSON REUTERS

★★★★★	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/10726602

800-968-8900 CS.ThomsonReuters.com

CCH ProSystem *fx* Practice Management

2012 OVERALL RATING ★★★★½

BEST FIT

Accounting firms of all sizes currently utilizing other ProSystem *fx* desktop solutions or firms looking for a standalone practice management solution

STRENGTHS

- Fully contained solution, without the need for purchasing additional modules
- Fully customizable to meet the needs of firms of all sizes and client focus
- Strong reporting options including ability to automatically run reports
- Driven by dashboards for each user level

POTENTIAL LIMITATIONS

- Native integrations are limited
- SaaS solution available, but currently only works with fellow SaaS products and not desktop solutions

ProSystem *fx* Practice Management is part of the ProSystem *fx* Suite from CCH. Built solely for accountants, ProSystem *fx* Practice Management is offered in three tiers, Basic, Office and Enterprise. The core functions of all three levels are identical. The Basic Edition is limited in reporting capabilities compared to other editions and does not include budgeting or client marketing tracking capabilities. The Enterprise Edition is intended for larger organizations and is reliant on the Microsoft SQL platform. The following review focuses solely on the Office Edition of ProSystem *fx* Practice Management.

SUMMARY & PRICING

ProSystem *fx* Practice Management provides an effective platform for managing time, expense and project management within accounting firms. Built on top of a sturdy database, ProSystem *fx* Practice Management can handle needs of firms of all sizes and client focus. The Office Edition is priced around $3,500 for a five user license. Additional users may be added at $220 for each user. The Basic Edition is priced at $770 for two users. Annual renewals are priced at 35% of original purchase price and include all support options.

CCH
a Wolters Kluwer business

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

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Office Tools Professional Practice Management 2012

2012 OVERALL RATING ★★★★½

BEST FIT

Smaller firms looking to increase workflow efficiency as well as integrate document management capabilities.

STRENGTHS

- Simple, single user interface is easy to understand and follow
- Integrates simple document management structure
- Integration offered for QuickBooks, Outlook and Lacerte

POTENTIAL LIMITATIONS

- May not meet needs for larger firms
- No cloud presence other than through Client Portal option

Practice Management 2012 is the third generation release from Office Tools Professional. Built on a simple-to-use single-screen interface, the focus is on quick navigation. Practice Management provides a complete set of customer relationship management tools in addition to time and expense keeping and practice management functions. Practice Management 2012 provides some entry-level document management capabilities as well.

SUMMARY & PRICING

Office Tools Professional Practice Management 2012 offers users a simple, single-screen interface and offers direct access to client information, billing and document management. Practice Management 2012 is flexible and can be tailored to meet accounting practitioners' needs, regardless of complexity. Practice Management 2012 can be implemented by firms of all sizes, but is intended for smaller accounting practices. Firms with 100 or more employees may require additional features not currently offered, while sole practitioners may not fully benefit from all of the features. Pricing starts at $500 for a single user and tiered pricing is available for five or more users and starts at $1,500. The productivity sync modules are priced at $250 each but discounts may apply when purchasing two or more modules. Annual renewal subscriptions are priced at 40% of original license purchase and include all updates and support.

★★★★★	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/10726592

661-951-9200 **www.officetoolspro.com**

CaseWare Time 2011

2012 OVERALL RATING ★★★★½

BEST FIT

Firms currently using CaseWare products

STRENGTHS

- Tight integration with CaseWare products
- Multiple preformatted reports along with strong customization options
- Built-in sync capability between Outlook/Exchange and client information

POTENTIAL LIMITATIONS

- No current cloud-based solution
- Integration generally limited to CaseWare products

CaseWare Time is the time, expense and practice management offering within the CaseWare product lineup. Built on the Microsoft SQL platform, the solution is fully scalable to meet the needs of sole practitioners as well as multi-location firms. CaseWare Time also includes a variety of tools to help ensure accounting professionals are running their firm as efficiently as possible.

SUMMARY & PRICING

CaseWare Time contains everything needed to efficiently track time and manage projects. Built with a Microsoft SQL backbone, CaseWare Time is fully scalable to meet the needs of sole practitioners as well as multi-location accounting firms. CaseWare Time is currently undergoing a product evolution process. Over the next 12-24 months, several additional modules and enhancements will be introduced, including a cloud-based solution.

CaseWare considers customer service as a core strength and these future enhancements are a derivative of this. Pricing starts at $500 for a single user license, and $1,000 for up to five users. Additional users may be added for $175 per user. Annual renewals are 50% of the current license cost. Pricing includes all features as detailed in the article.

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

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10726495

800-267-1317 ext. 142 **www.caseware.com**

2012 ACCOUNTANT'S TECHNOLOGY & SERVICES GUIDE

Find the Tools & Tech to Help You and Your Clients Succeed

By Isaac O'Bannon, Editor

As a professional, your firm likely has many unique needs that are based on many factors, including the types of clients you serve and the needs of your staff. Finding the solutions and the right tools to help you work where, when and how you want, can be just as critical to your productivity as developing the best workflow processes and finding the right team to work with you, but with the constantly changing nature of technology, it can be a challenge.

The same challenges are faced by your clients, who are looking for ways to increase their own productivity and to be better able to compete in today's economy. Where do they turn when they have questions about their financial capabilities? As their accountant, they likely turn to you, their most trusted advisor. When it comes to business and tax strategies, professionals already have the knowledge and resources necessary to help their clients succeed.

These same clients, however, may also ask for technology advice related to their business management, workflow and internal accounting processes. With the diversity of small businesses and high net worth individuals in the United States, the best tools for one client may not be the best fit for another, but they expect their financial experts to provide guidance in finding and implementing solutions that can help them work more efficiently and profitably.

Helping them work smarter not only strengthens your relationship, but also can help you provide them with better service, through improved data accuracy and tighter financial controls. Plus, fiscally stronger clients are more likely to stay clients in the long run.

While it's virtually impossible for any professional to keep up with all of the technologies and services on the market for tax and accounting professionals, or their small business clients, the 2012 Technology and Services Guide is your starting point, providing a one-stop reference tool that can help you find the right tools for own practice, and help clients in their businesses.

The guide features categorized listings for firm and client-side software, online programs, services and other technologies. This is just one of the resources that *CPA Practice Advisor* and *NSA Practice Advisor* offers as your source for the technology information you need to help your clients and your own firm be more productive and profitable. ■

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Serenic also offers Serenic Navigator Online, a streamlined SaaS (Software as a Service) version of our award-winning Navigator financial management system to small and mid-sized nonprofit organizations.

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(see also Time & Billing)

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(see also Practice Management)

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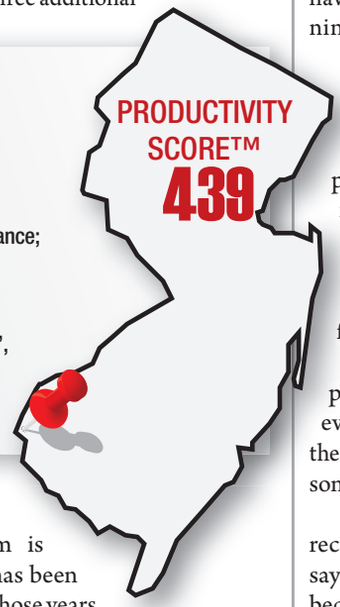
BY ISAAC M. O'BANNON, *EDITOR*

Combining New Tech with Old Fashioned Values

To those not from the upper east coast, the thought of New Jersey may evoke scenes of major metropolitan areas, skyscrapers and New York City commuters, or unfairly of Tony Soprano, Snookie from Jersey Shore and or other Hollywood fabrications. These common misconceptions certainly don't apply to the entire state, especially the more pastoral scenes of the south part of the state, which has farms, old woods and small town life.

Those features are exactly what Ron Zarin, a CPA in the southern New Jersey township of Pennsville loves about the place, and why he's stayed close to his hometown for most of his professional life. I met him at the New Jersey Society of CPAs annual business and technology conference in May.

Ronald D. Zarin, CPA
Firm: Managing Shareholder, Zarin & Associates, PC, CPAs
LOCATION: Pennsville, New Jersey
WEBSITE: www.ZarinCPA.com
PRACTICE SPECIALTIES: Federal and state tax planning and compliance; Business and technology consulting; New business formation; litigation support services.
EDUCATION: Rowan University
HOBBIES: Gardening and enjoying the great outdoors, 'weather buff', skiing, photography, spending time at the Jersey shore with family.
LINKEDIN: www.linkedin.com/in/ronaldzarin



Although Pennsville is only about 15 miles from Wilmington, Delaware, and about 40 miles from Philadelphia, it is definitely small town America, with a population of just over 13,000 and a small business community comprised of mostly closely-held businesses.

After earning a degree in accounting from nearby Rowan University (then named Glassboro State College), Ron started out his career working first for a small firm and then a mid-sized regional practice, but after six years he said his urge to work for himself finally won out.

"I've always been a numbers person and always had the desire to go into business for myself within the small business world," Ron said. Fortunately, the practice he was working for accommodated his transition, allowing him to work part-time while he was building his own non-competitive firm.

So it was that in 1988 the firm of Zarin & Associates, CPAs (www.ZarinCPA.com) was started, and by the end of a first year that saw rapid new client growth, he had enough business to dedicate his time fully to the new firm. Seeing an open market for serving small businesses, the young and determined entrepreneur saw that growth continue, and by the next year had hired an office administrator.

In the 24 years since then, the practice has grown to a staff of eight, including tax professionals, the practice manager and three additional CPAs, one of whom is Daphne Miller, who has been with the firm for 20 of those years. "We have tried to manage our growth, and are selective when accepting new clients to ensure they fit within our practice model," he noted.

The firm specializes in multi-state tax planning and compliance, business and technology consulting, new business formation and start-up services and litigation support, serving about 225 business entities and 300 individuals. The firm also offers part-time CFO and payroll services.

As with many CPAs across the country, his in-depth knowledge of the business community gives him insight into the evolving economic issues in the region. His view, at least for the area around southern New Jersey, Delaware and Pennsylvania, is that the hardest times are bottoming out, but haven't really seen a rebound yet.

"We have some clients that are doing really well, but some are still struggling, especially those in construction and real estate," he said. "Most businesses have trimmed as much overhead are as lean as they can be, and they're making it work. So, folks are thinking more positively than a year ago, feeling that things are going to get better."

But even with some good news and "slight improvements in sales volumes and other indicators," he says that there are still challenges for businesses seeking funding. "With banks requiring more and more data, even people with great credit are facing a hurdle." Fortunately, these businesses have Ron and his staff to turn to for business planning and strategy.

Although not one to put himself on a pedestal, one of the keys to the firm's success has been Ron's interest in technology, which has led the firm to use a suite of practice and client service programs that are fully integrated, along with remote access and online tools for payroll and client portals, which he says has helped serve the clients in the tri-state area and has helped the firm retain clients who have moved to states as far away as Florida and New Hampshire.

"Keeping up with technology is a perpetual process, no different than keeping up with the ever-changing tax laws. But I love it and am up for the challenge," he said, noting that he admits to being somewhat of a techno geek.

One of the most successful changes they've made recently is the addition of client portals, which he says most of his business clients have embraced because of the enhanced collaboration "The more they use it and get comfortable with it, the more they like it. Personally, I think the changes have made accounting fun again, even though naturally we're creatures of habit."

Among the tools he uses to keep up with evolving technology is the free Productivity Survey at www.CPAPracticeAdvisor.com/productivity, which helps firms gauge how they are performing compared to similar regional practices, and also offers suggestions based on a firm's needs. Zarin & Associates scored a 349 in July of last year, but through implementing new technology, portals and improved workflow processes, raised that score to 439 as of May 2012.

In addition to the remote access, portals and integrated professional accounting systems, the firm also uses multiple monitors at all workstations, with a goal of increasing that to three to four screens per desk this year. They are also continually experimenting with cloud apps and online storage options.

Zarin & Associates: Back row: Lou Zappone, Colleen Conrad, Beverly Erdner, Sharon Cook; Front row: Ron Zarin, Daphne Miller, Jim Buck. (Not pictured: Brittany Ballard.)

But just because Ron is tech savvy doesn't mean he's lost the personal touch.

"We are a very progressive firm with old-fashioned values," Ron said. "We're passionate about serving our clients to the best of our ability, and I think we go to the nth degree. This is the very foundation on which our firm was built, and we make all efforts to really get to know our clients and to understand how they tick. The more we know about them, the more we can help them."

Outside of the office, Ron is active in the local business community as a member of the Pennsville Business Association (www.pbassoc.org), the Salem County Chamber of Commerce (www.salemcountychamber.com) and is on the economic development committee and land planning board of the township he lives in.

Together with his wife Debbie, formerly an assistant vice president with Chase in Wilmington, DE, the family also includes their three children: 19 year old Dana who is attending Ron's alma mater, 13 year old Rachel and 4 year old Kevin. The same remote technologies that help Ron's firm be more productive also help him spend more time at home with the family.

While the Jersey Shore and Atlantic City aren't that far away, Ron much prefers the "real New Jersey," with family and friends, working in the garden or relaxing on the deck as deer and wild turkeys roam through the yard.

What We've Learned

(an interesting stat)

PRODUCTIVITY SCORE AVERAGES

Regarding wireless in the office: Over one-third of firms indicate that they provide wireless access in their offices. Unfortunately, 10% don't seem to encrypt and/or hide the SSID.

InFirm:
Communicating IT

There's no doubt that information technology impacts every aspect of today's accounting firms and most firms do a pretty good job of identifying opportunities where new technologies can improve their practice. These items eventually find their way into the firm's strategic plans, but unfortunately very few firms do an exceptional job of implementing and following through on these new technologies.

In many cases this failure is due to a lack of understanding or vision of what a specific technology can do for the various members of the firm. Successful adoption of information technology can be greatly bolstered by effective communications and understanding that the different constituencies within a firm have different needs and expectations when discussing and adopting technology. The three major groups that the IT team needs to craft their message towards are: management, staff, and technical personnel. Below we identify key communication considerations when proposing the adoption of information technology to each group:

Roman H. Kepczyk, CPA.CITP

Roman H. Kepczyk, CPA.CITP is Director of Consulting for Xcentric, LLC. and works exclusively with accounting firms to implement today's leading best practices and technologies. Roman recently updated his "Quantum of Paperless: A Partner's Guide to Accounting Firm Optimization," which is available at Amazon.com.

Management: Most accounting firm owners grew up in an era where knowledge of business and tax laws were the primary reason for success and technology was something that was very expensive that the staff used to get work done. It's often said that accounting firm partners are all for technology as long as they don't have to change anything that they are doing.

To communicate with management, it is important to point out that all of the firm's future strategic growth and retention plans rely significantly on information technology, and by adopting the right tools, the firm will develop a competitive advantage.

When communicating with owners it is important to minimize their risk of making a decision to select a specific technology. Owners want to see that they are not adopting unproven, "bleeding edge" technologies. By sharing industry benchmarks on adoption and well interviewed references from peer firms, the IT team will find that owners are much more open to considering a solution, particularly if there are quotes from other owners about the time savings, improved productivity, and an obvious return on the technology investment (ROI) as most partners are not adverse to investments, when they are presented profitably.

Communicating with owners one on one or as a partner group to explain how a technology works, what the process changes would be, and who would be impacted is also very important for the owners, so they can ask questions freely from a management perspective without having to do so in front of staff (which may create embarrassment).

As financial justification is very important to owners, having a well-managed budget that monitors the IT investment is critical. Best practices point to having all ongoing expenses listed out at least two years into the future, so the owners understand the "baseline" of recurring costs if the firm maintains the status quo.

This portion is easy for the IT Team to get approval on, as it has already been approved and the costs are usually for ongoing maintenance and replacement. The IT Team can then break out separate line items for new projects so that each individual item can be discussed and approved by management based on its own merits.

Professional Staff: When proposing a new technology to staff, it is important to identify a champion that is actively working in the area that will be impacted by that technology so that they can be involved with product evaluation and selection, as well as the pilot program to verify the tool works as it is supposed to. Designating your most effective tax or audit professional as the champion will help get the rest of the staff to buy-in, particularly if their pilot program results in obvious, tangible improvements that the champion can articulate to team members.

The advantage of using product champions to communicate IT initiatives is that they can differentiate the firm's current processes from those proposed by the technology, as well as identify training needs and processes that need to be documented. Sending product champions to vendor User's Conferences and exposing them to industry information such as the AICPA Top

Technology Initiatives or AAA Paperless Benchmark Surveys gives them more information and

resources to bolster their recommendations and promote successful adoption. Being part of a peer accounting firm association will also allow the firm to network with peer firms that have already adopted a technology and may have tips or other documented resources to reduce the time the firm needs to adopt a specific process or too.

Best practices also point to firms allocating hours to product champions for research, training, and documentation of specific firm processes in a written format, and that the champions are given chargeable credit for working on firm initiatives. It is important that this work be seen as being just as valuable as client work, otherwise it will always have a lower priority and never be completed. Some firms allocate at least four hours per week to the champions so that they regularly utilize 10% of their time focused on improving firm production.

Technical Personnel: While firms traditionally have their own internal IT personnel, the trend in recent years has been to outsource all "one shot" implementations such as Security, WTS/Citrix, Firewalls, etc. to a subject expert which is usually a local network integrator or application specialist. As more applications and even entire firms, transition to cloud based applications, they are transitioning the IT responsibility to external personnel that are not the direct employees of the firm.

Since these personnel often work unusual hours or from offsite locations, it is critical to clearly define expectations in writing and provide a prioritization of issues that is reasonable balance between keeping firm personnel working and adopting new technologies. Often times, external IT personnel don't understand the tax deadlines or the business cost to a specific group when an application does not function, so having the IT team reprioritize items in writing and explain why certain items have a priority will help the external IT team work on those projects that are most important at any given time.

Since IT personnel tend to speak more "Technise" and management personnel tend to speak more "ROI," best practices point to the IT team developing an IT "flash report" which lists all the key IT performance indicators on a single sheet and the changes from the previous period so that the firm can identify trends and talk to IT on a predetermined basis. This also provides assurance to management that all key IT maintenance items are also being looked at regularly since they may not always be sure of what IT personnel do all day in their "little back rooms."

By understanding what the needs of each audience is, and communicating in that group's language, the IT team can move towards "exceptional" implementations on a firm-wide scale and have a better chance of adopting their firm's strategic technology initiatives.

7 Tips for Fostering and Retaining the Best Employees

Sending the right message is key to keeping your most stellar employees.

Steve Carell as Michael Scott from NBC's "The Office."

It's all about firm culture these days. The more positive the environment, the happier your employees are. And the happier employees are, the better service your clients receive. It's the best kind of ripple effect.

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.

Every firm has those employees that shine brighter…those that you wish you could clone. These are the employees that make you say, "I don't know what I would do without her." They are super efficient, loved by clients and all around fabulous at their jobs. These are the folks that you want to keep satisfied and challenged.

Retaining your cream-of-the-croppers is simply a smart business move. Turnover is costly on many levels, so it's worth the extra effort to ensure employee satisfaction. To help enhance your firm's culture, implement your own unique internal marketing program that will send the right *message* to your staff—building loyalty to your firm and keeping your most fabulous employees around for the long haul.

The following seven tips will get you started:

1 Your Employees Should 'Feel the Love'—A key reason for voluntary termination by employees is that they feel management does not recognize or care about their contributions to the business. Make the effort to praise your employees on a regular basis. Good employees will stay if they feel they have a positive relationship with the firm's leaders and managers.

2 Understand Your Employees' Potential—It's your responsibility to identify the unique talents of your employees and make sure that their assigned duties match their skills. Employees feel better about their job when they are successful at it. Don't set employees up for failure by assigning tasks outside of their skill set.

3 Communicate What is Expected of Employees—Satisfied employees know clearly what is expected from him or her every day in the workplace. Maintain consistency with expectations. Changing expectations creates an unhealthy, stressful environment (very bad for the firm's overall culture). Constant change makes employees feel on edge, robbing them of internal security and making them feel unsuccessful. While it's understandable that job descriptions will change, expectations can remain consistent.

4 Provide Staff with the Necessary Tools and Training—Frustration is the leading killer of a positive employee-employer relationship, and staff members will quickly get agitated if they do not have the proper technology and tools in place to perform their jobs effectively. Frustration will also set in if proper training is not offered on both the technology used by the firm and the job itself. Firm leaders must put in the time to ensure that their firms are using the right solutions and that staff is trained for success.

5 Offer Awards and Incentives—Spotlight your best employees and offer incentives to keep them engaged and happy. For example, display their name on a centrally located board where it's visible by everyone and/or award them with a gift card for dinner or movie tickets for a job well done. You can also offer a bonus program to staff; for example, a set percentage based on the number of new clients they bring through the door. And, of course, just saying thank you goes a long way as well.

6 Keep Employees Challenged—Employees are motivated when they feel challenged in their position. When they are not challenged, they can quickly get bored and are more likely to leave. A motivated employee wants to contribute to the success of the firm and take on work that falls outside of their job description. Think about the employees in your firm that could contribute far more than what they currently do. Approach these individuals and offer them more responsibility. You will likely get a very enthusiastic response.

7 Treat Employees with Respect—Morale is affected negatively when you do not show employees the proper respect. Never reprimand or criticize an employee in a public forum or in front of their peers. Also be sure to thank employees for going the extra mile or acknowledge when you have made a mistake.

Maintaining a positive culture is key in retaining your best employees. Doing a little creative internal marketing doesn't have to take much time. Most often, sending the right message is recognized through a culture of mutual respect, a simple "thank you," and maintaining consistency in expectations. Outside of these things, you can easily implement unique incentive programs, ensure the proper level of staff training, and upgrade your firm's technology—to name a few.

Follow these seven tips and you will better position your firm to keep the *best of the best* on staff. What message are you sending to your employees?

CONTINUED FROM PAGE 6

firm partners and management need to adapt to ensure that they are engaging these younger business leaders."

One of the key desires of younger professionals is mobility and remote access options that allow them to have a work-life balance that, while attaining the same level of productivity for the firm, doesn't require being in a physical office for 40 to 60 or more hours per week.

"The newer generations of professionals don't expect to work less, they simply want to be able to do some of their work from places that may be more convenient to other aspects of their lives." Mackintosh shares this desire for work-life balance, and the technologies used by CCH allow her to work remotely or from the CCH's Irving, Texas office, while managing workflow among staff located in Wichita, Kansas, Torrance, California, and Riverwoods, Illinois. This flexibility gives her more time with her family, including husband Craig and children Avery and Brooks, to maintain a more positive work-life balance.

Among the factors that led her to taking the new position, Mackintosh noted CCH's significant investment in new platforms and products. "CCH is really committed to innovative thinking that helps serve the profession, such as the Next Generation ProSystem fx Suite, which includes the core areas of tax, portals, document management, workflow and practice management. These systems show a significant investment into the U.S. market by Wolters Kluwer," the parent company of CCH.

As for what CCH is working on next, Mackintosh is excited about the Open Integration Platform (OIP), which will give customers and third party developers the ability to integrate other applications with CCH's cloud-based solutions.

"We're thinking about how we can serve professional firms better in terms of a larger ecosystem of technology. While large firms may have the tech resources to build apps on top of a platform that is specific to their needs, OIP will bring this capability to smaller sized firms, enabling them to tailor systems and apps to their workflow and help them be more productive."

"CCH's developments with OIP, as well as other cloud and mobile initiatives, show that our number one goal is to help professionals be more effective and responsive to their clients, helping them have the right tools to service their clients' needs today and tomorrow."

The position Mackintosh is filling was created last year when CCH reorganized its tax and accounting divisions. "We decided to sharpen our focus on process driven areas such as tax and audit, to better understand and serve our customers in small, mid-sized and large practices," said CCH President and CEO Mike Sabbatis.

"We wanted leaders for these groups who had broad experience in development and product management, and Teresa was a perfect fit, being a CPA, having worked in all areas of taxation and firm technologies and successfully managing a business group. She is an excellent executive with a proven track record and fits the goals I have for the direction of CCH."

Isaac M. O'Bannon, Editor

Mr. O'Bannon is the chief editor and digital content director for CPA Practice Advisor.

Since joining the publication in 2002, Isaac has contributed reviews, columns and features, drawing on two decades of experience in the areas of professional accounting, business productivity and consumer technologies.

PRACTICAL RESOURCES

CLASSIFIED

The Changing Role of the IT Professional

As our profession evolves, the role of IT professionals in tax & accounting firms is changing. More and more firms have either moved to the cloud or are preparing to make the leap. The attitude of most firms has transitioned over the last couple years from resistance to preparation for adoption of the cloud. And, this change in thinking is not coming solely from firm leadership; much of this change is being driven by IT professionals within the firms. So what impact does this have on the IT professional's role within the firm?

With little to no in-house IT infrastructure to support, the IT professional's role will evolve to be less about troubleshooting servers and more about strategy and communication. The required skill-set will change and those who adapt by developing these skills can elevate themselves within the firm. Those who do not, run the risk of being left behind. Professional development for IT will need to focus on management, leadership and communication rather than obtaining technology certifications.

Jim Boomer, CPA.CITP

Jim Boomer is a shareholder and the CIO for Boomer Consulting, Inc. He is the director of the Boomer Technology Circles™ and an expert on managing technology within an accounting firm. He also serves as a strategic planning and technology consultant and firm adviser in the areas of performance and risk management. In addition, Jim is leading a new program, The Producer Circle, in collaboration with CPA2BIZ and the AICPA.

Understanding Processes

Understanding the way people work and the steps they take to get their work done should be a huge part of the IT professional's role. This understanding will be the key driver for determining the tools that will improve workflow. Gaining this understanding will require more preemptive measures than in the past. IT will be expected to be proactive rather than reacting to problems that arise and become unbearable for the end user. Sitting down, watching people work and asking the right questions will be vital.

PROFESSIONAL DEVELOPMENT FOR IT WILL NEED TO FOCUS ON MANAGEMENT, LEADERSHIP AND COMMUNICATION RATHER THAN OBTAINING TECHNOLOGY CERTIFICATIONS.

Alignment with Training & Learning

As the IT professional becomes more of the facilitator for helping people do their job more efficiently, the connection with the training and learning professional must strengthen. Interfaces will change and new tools will replace in-house technologies that have been used for years. This will require someone that understands both the processes and the new technology tools to educate the firm about the new way of getting work done. The need for someone who "gets it" when it comes to technology will become very important to developing curriculum.

A Seat at the Table

Regardless of whether firms choose to migrate to the cloud or not, technology has become so integral to a firm's success that it is critical to ensure there is alignment between firm strategy and IT. This is very difficult to achieve unless you give your CIO or Director of IT a seat at the management table. Let's look at five ways CIOs can provide a strategic advantage and why they should be contributing members of the management team.

- CIOs bring a different perspective to the table than most partners. They see the entire enterprise and approach strategy from the viewpoint of breaking down barriers and silos.
- CIOs understand how technology can improve efficiency and effectiveness. They can provide innovative insight into firm and client strategies that will add value.
- The firms with the best technology are those firms with strong IT leadership. CIOs often have to deliver news that client service partners don't want to hear – "we have to invest." Having a strong CIO on your team who supports the firm's vision and integrates technology is a strategic advantage.
- CIOs have project management skills essential to the success of the firm. These are skills that most partners, managers and staff lack even though they would be extremely beneficial.
- One of the key roles of the CIO is to assist leadership and management in developing new services and revenue streams. A quality CIO can assist you in meeting these challenges.

Critical Skills of a CIO

In the past, the IT professional's performance has been measured primarily on their technology skills. While important, to truly become a CIO and elevate to a more strategic level, sufficiency is required in other areas as well.

- Business Savvy
- Communication
- Marketing & Sales
- Human Resources
- Project Management
- Budgeting & Cash Flow
- Strategy & Planning

While your IT leader might not be at an "expert" level in all areas, you need to look for potential. Do they show a willingness to learn new skills and a desire to develop beyond their current position? If the answer is yes, you likely have the right person and need to invest in development and training programs. You also need to encourage them to join a peer community and share broadly.

Technology will continue to change and the pace of that change will only increase. IT professionals can either adapt to that change and move forward, or get left behind. If they choose to adapt, they will increase their value to the firm and be rewarded with greater leadership responsibility.