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EDITION

Today's Technology for Tomorrow's Firm

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**2014 IT  
Predictions  
and  
2013 Results**

## ANNUAL

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'Tis the Season for Tech

**How Important is  
Your Firm's Website?**

**Why Your Firm  
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By M. Darren Root, CPA.CITP, Executive Editor

**MY PERSPECTIVE**

# Making the "Freedom To" Connection

**W**hen you hear the term "digital CPA" what do you think of? An accounting professional who is wired 24/7? A CPA who uses the latest technology to optimize

**their accounting practice?** Both could be used as a literal definition of what a digital CPA *does*, but if we limit ourselves to thinking about technology only as a physical tool that we use to do our work, we are, quite frankly, missing the point.

To me, being a digital CPA is about developing a practice with an optimal level of connectivity that allows us, and our businesses, to reach their full potential. As entrepreneurs and leaders, our job is not to work *in* our firms...it is to focus on the future of our companies. I learned this the hard way after twenty years of working long hours, under high stress, dealing with mountains of paper-based records.

look more closely, it is really about creating a level of connectivity in an accounting practice that gives both you and your clients the freedom to.

For you, the connectivity of being a digital CPA offers the freedom to do things that you want to do, like spend more time with your family and or taking an extended vacation. For your clients, it provides the freedom to accomplish their accounting and access

than the people who mastered the complexities of the past, who get to say what happens in the future." There is no doubt that today, and in the future, firms that use digital tools to become intimately aware of their clients, more agile in service delivery, and actively engaged with clients and prospects will outperform those that don't.

Developing both a "freedom to" mentality and a state of true connectedness in your firm is a critical part of becoming a digital CPA. Making this kind of "freedom to connection" focuses our efforts on what the end game really is—to have a business that supports the life we want, while providing clients with the highest quality of service. ●

THERE IS NO DOUBT THAT TODAY, AND IN THE FUTURE, FIRMS THAT USE DIGITAL TOOLS TO BECOME INTIMATELY AWARE OF THEIR CLIENTS, MORE AGILE IN SERVICE DELIVERY, AND ACTIVELY ENGAGED WITH CLIENTS AND PROSPECTS WILL OUTPERFORM THOSE THAT DON'T.

Near the point of burnout, I knew that if this was how my practice was going to continue to operate, I was not going to be able to do the things I wanted to do outside of it—and it definitely was not going to be a business that I would want to pass down to my children, if they chose to follow in my footsteps. This is when I realized that I needed to utilize digital tools to create a "freedom to" connection in my firm.

While on the surface the adoption of web and mobile based technology may seem like an attempt to obtain freedom from things such as long hours, high stress, volumes of paper, and doing work outside of our core capabilities—if you

information conveniently and securely, through the channels they prefer.

In addition to improving the efficiency of your firm and enhancing the services that you provide, using the Web and mobile technology to develop a high level of connectedness also represents a new way of thinking about how you market your firm. In today's world, successful businesses and brands are not static. Instead, they use digital tools to better serve their clients and to develop connections that are meaningful and lasting.

As author and professor Clay Shirky said, "It is the people who figure out how to work simply in the present, rather



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.

# CPA Practice Advisor

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\*1.3 million based on number of users from paying QuickBooks Online companies worldwide, May 2013. Leader in cloud-based accounting based on number of paying QuickBooks Online companies worldwide, May 2013.

# 2014 IT Predictions and 2013 Results

**W**inston Churchill once said, “It is always wise to look ahead, but difficult to look further than we can see,” which is applicable to many accounting firm partners that are so busy and focused on getting today’s work done that they seldom take the time to think about how they can improve their practices to operate more effectively in the future.

In that light, *CPA Practice Advisor* has asked me to share my information technology predictions for the next year and expose readers to the trends we feel will improve their accounting firm production beyond the upcoming busy season. However, before we can look towards 2014, it is only fair that we stand up to defend our predictions for last year where fortunately, we had more WINS than LOSSES:



Roman H. Kepczyk, CPA.CITP and Lean Six Sigma Black Belt is Director of Consulting for Xcentric, LLC and works exclusively with accounting firms to optimize their internal production workflows within their tax, audit, client services and administrative areas. His *Quantum of Paperless Guide* ([Amazon.com](http://Amazon.com)) has been updated with 2013 paperless benchmark statistics and outlines 32 digital best practices all accounting firm partners need to understand today.

## 2013 InFirm IT Trends Impacting Accounting Firms:

- **Hybrid Cloud Becomes Commonplace (DRAW):** A hybrid cloud is where firms use the optimal combination of external cloud resources and private/hosted cloud applications that they manage themselves. While virtually every firm is using a cloud application for research, payroll, document management, email, or connecting to their own infrastructure via remote access tools like Citrix or Windows Terminal Server, we listed this as a DRAW since most firms don’t realize they are using a hybrid cloud environment and many are not sure what it is.
- **“Actionable Analytics” is New Buzzword (WIN):** We saw the vendors roll out dashboard tools that provide real-time information instead of traditional backward looking financial results. We also saw firms evaluating their own KPIs that let them be proactive and take action based on the data in their systems. These vendors are already delivering information via mobile applications and we anticipate that smart watches will be the next beneficiary within five years (as we predicted last year).
- **Unified Communications Expands (WIN):** Integrating voicemail, digital faxes, instant messaging and even video calling into a single unified communications with email has never been easier with tools such as Microsoft Lync and hosted Microsoft Exchange, which continues to expand along with

new phone systems that integrate computer telephony integration.

- **BYOD Prevails (DRAW):** While a recent Tech Republic survey stated 62 percent of businesses are adopting “Bring Your Own Device” policies, accounting firms have been much slower to formally implement them. We voted this a DRAW, as most firm personnel do BYOD, but if you ask the owners, they are not aware of it and many firms have not formally adopted a policy.
- **Digital Delivery Surpasses Manual Delivery (LOSS):** According to the 2013 AAA Paperless Benchmark survey only 35 percent of firms delivered more returns electronically than physically, so while firms are making progress with secured email and portals, the scales did not tip in our favor.
- **Security Emphasis on Privacy not Passwords (LOSS):** This is an obvious LOSS as the privacy discussion does not seem to happen in most firms beyond Human Resources and most firms continue to do a marginal job on maintaining passwords properly.
- **BIG DATA for Accountants hits Radar (WIN):** The concept of Big Data has gotten a noticeable amount of press this year and the major vendors and consultants to the profession have jumped on the bandwagon to acknowledge that there is a lot of information within our tax and practice systems that firms could take advantage of in the future to direct resources and make business decisions.
- **Fourth SaaS Player Gets Notice (WIN):** We guessed that a fourth SaaS player would be noticed in the accounting profession, which was confirmed by Xero as they made Intuit take notice of an online accounting competitor, which incidentally garnered another \$150 Million in capital to expand their market share.
- **Internal IT Staff Disintermediation (WIN):** As technology evolves faster than internal personnel skills, firms are outsourcing more “one shot”

implementations as well as reducing staff as they transition applications to the cloud and no longer need the specialized networking support internally. We have seen the number of IT personnel in firms decrease overall, which makes this a WIN.

- **Partners Recognize IT Risk (DRAW):** While IT Governance did jump up the list of firm concerns, we did not see more than a minimal effort to respond in a manner beyond the bare minimum, which is why we are classifying this prediction as a DRAW.

Overall, with five (WIN), two (LOSE), and three (DRAW) predictions, we know we may have pushed the envelope too much with our predictions, but sometimes it’s a matter of timing more than a matter of being completely wrong, so we have updated our predictions for 2014 with the hopes that you will have a slightly less difficult time envisioning your firm’s future that could evolve because of the following 2014 information technology predictions:

- **Windows 8 Struggles Against Windows 7:** As Microsoft is dropping future support for Windows XP next busy season, firms will upgrade to what they know and understand, which is Windows 7. Even though Windows 8.1 will have a start button capability, the lack of touch accounting applications will have firms sticking with Windows 7 continuing to be the dominant operating system in accounting firms.
- **QuickBooks Online Fights Back:** Intuit has always been a fierce competitor and Xero has given them the opportunity to take on the biggest challenge since Microsoft Small Business Accounting. Expect to see Intuit jump at the accounting firm market with expanded resources and tactics to keep us hooked on their hosted and online versions until they can deliver a truly competitive online product (probably a prediction for the 2015 list).

- **Hosted Exchange Users Leap Forward:** Small to medium-sized single office firms that have to update or replace their Exchange server will find that using Microsoft to host their Exchange is just too good a deal to turn down, so we predict a significant uptake within accounting firms on this cloud application.
- **Cloud Hybridization Continues to the Majority of Firms:** Though I took this as a DRAW last year, I think that there will be continual success, particularly in the small and medium-sized firms as they adopt cloud based applications or build their own private cloud, so we are pushing for a WIN next year on this one!
- **Security Concerns Will Promote Cloud Adoption:** Every prediction list should have something about

security and we feel that it will become increasingly hard for firms to ensure their own IT security internally, which in turn will drive firms to cloud-based solutions for email, portals, document management and outsourced monitoring that integrate Enterprise-class security capabilities.

- **BYOD Policies Will Abound:** We feel firms will address the Bring Your Own Device trend this year and consultants will be assisting firms adapt to this trend with many firms implementing policies and providing training to firm personnel on managing in this environment.
- **Video Calling Becomes Standardized:** I'm going to try this one again for 2014 as we see the adoption of Lync and Skype making it easy for individuals to utilize video calling,

particularly as it is being used on the consumer level with both tablets and smart phones. So this prediction is that there will be a majority of firms that have video calling capabilities implemented in their firm next year.

- **Social Media Subsystems:** We expect to see CPA firm Associations and accounting niche groups begin to take advantage of semi-private social media tools (think SocialCast, Yahoo Groups, etc.) that will allow them to network and share information on specific topics in a semi-closed environment.
- **Little Data Makes Inroads in Accounting Firms:** At least one major accounting vendor will add "Big Data" capabilities to their tax or practice management system that will provide firms with better information about their clients and their needs.

- **Game Based Training Announced:** Corporate America is finding that game-based training that promotes the adoption of application skills is more successful, so we expect that an application vendor to the accounting profession will talk about "gamification" in one of their applications before the 2014 year end.

So there are our 2014 predictions. In closing, Winston Churchill was also quoted as saying that "Everyone has his day and some days last longer than others"...seems like he understood accountants during busy season. We hope you make the most of the upcoming "longer days" and realize the prosperous opportunities they provide accountants today and in the future. ●

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## REVIEW SECTIONS

## BASIC SYSTEM FUNCTIONS

- General navigation/ease of use
- Content delivery options: paper, CD/DVD, online, All
- Organization sorted by relevance/importance
- Multiple user management
- Multiple browser support
- Various subscription options
- Search routines
- Integration w/T&B applications for billing, DMS output, etc.

## CONTENT

- Licensing options (named users, concurrent users, site license, etc.)
- Multiple providers
- Publicly available
- Breadth of content (Fed, State, A&A, other compliance offerings)
- Newsletters
- Wizards for certain specialized research types
- Templating

## CUSTOMIZATION

- User preferences
- Alerts
- Saved searches/documents

## INTEGRATION &amp; IMPORT/EXPORT

- Integration with Word Document/client letter integration
- Integration with DMS, Portal, Browser toolbar
- Saving & printing to multiple file formats
- Activity/usage reporting for management
- Support for capturing info for billing back charges to clients

## HELP/SUPPORT/TRAINING

- Built-in support features
- System/content update frequency
- Support website/documentation
- Live support, where is support located, hours
- Live chat w/other users
- Multiple training options

# Tax Research Systems Offer Strong Customization, Automation Features

In my early days of practicing accounting, a wise and experienced accountant told me that as my career progressed, I would be essentially practicing law instead of mind-numbing number crunching. It didn't take long for me to understand what he meant.

A five-minute question from a client rarely translated into a five-minute answer. IRS publications and Google searches sometimes proved to be fruitless, while answers fitting a client's facts and circumstances could only be found after hours of digging through treasury regulations and tax court cases.

Technology can automate much of today's accounting data entry, for example, by populating scanned information from W-2s and directly transferring numbers from accounting software into a firm's tax software. Similarly, technology has greatly impacted tax research in the profession, with nearly all of the software being Internet-based. Compared to going through thick books, today's online tax research services are easily accessible, simple to operate, and updated daily.

Despite our powerful software, tax research remains a challenging value-added activity requiring the fact analysis and judgment that only the human brain can provide. Unlike data entry tasks, tax research can't be automated. Effective tax research goes far beyond proficiency with the tools; tax researchers must know how to identify the issues, understand and evaluate the authority, and finally, communicate the findings. However, knowing the software well certainly speeds up the process.

A solid understanding of search tools may mean the difference between a research project taking two hours or two days. This may require some training and practice for those accountants whose natural instinct is to type a few words into Google and click on "I'm



Feeling Lucky." Perhaps I've run out of luck, but often my path to an answer is through search operators/connectors, wildcard characters, or searching within specific sources.

Research software is often used as a "quote book" to simply give clients answers to their questions. However, tax research software vendors are adding features to make them more collaborative and customizable.

For example, some platforms allow organizing documents into folders, highlighting text, annotating documents, and easily sharing research with colleagues or third parties. When users take advantage of these features, research software can become more than just a client answer tool. The software may become an interactive teaching and self-study tool.

Research resources are becoming indispensable for tax professionals among today's growing mobile workforce. Tax research software vendors have taken note of mobility trends and are offering mobile apps and scaled-down versions of their websites for

smartphone and tablet use.

While the mobile apps and sites may not currently have all the functionality of the full sites, they generally can accomplish the most common tasks of searching libraries and then sharing or e-mailing documents to clients. Today's tax research mobile sites and apps make it easier to quickly research and respond to questions while out of the office than ever before.

When choosing a tax research platform, firm owners and professionals should experiment with trial versions and consider if the content offered is adequate for the firm's needs, keeping in mind that certain specialty libraries may be helpful for a firm establishing an industry niche.

Firms should feel comfortable with a service's search capabilities. Training is another important consideration, as each product's usefulness is limited to extent it is used correctly. Finally, don't forget to evaluate the mobile apps or websites. You or your employees may end up liking and using the mobile platforms more than you may initially think. ●



## Dustin Wheeler, CPA

Dustin Wheeler is a Las Vegas based CPA and QuickBooks ProAdvisor providing tax, audit, accounting, and technology consulting services. He blogs about technology and accounting at [www.dustinwheelercpa.com](http://www.dustinwheelercpa.com).

## Intuit Tax Research for Lacerte and ProSeries

2013  
OVERALL  
RATING

4.25

### BEST FIT

Firms using Intuit's tax preparation products will benefit from the easy access and built-in search box into both Lacerte and ProSeries.

### STRENGTHS

- Search is powered with Google technology.
- Research website launches from tax preparation programs with no need to enter a username or password.
- Research documents can be "attached" to a client's Lacerte or ProSeries file for later reference.
- Simple to learn and begin using; how-to videos help users learn to use the product in under 7 minutes.

- Pricing is all-inclusive and licensed for all Lacerte or ProSeries "seats" a firm has purchased.

### POTENTIAL LIMITATIONS

- Currently, there is no mobile app, and experience may not be optimal on portable devices.
- Content is primarily focused on federal and state income tax issues; limited materials for accounting, auditing and other types of taxes.
- No ability to highlight or annotate documents within the program, though it could be done after printing to PDF (in Adobe Acrobat) or copying and pasting to another program

Read the full review and see expanded ratings for this product online at:  
[www.CPAPracticeAdvisor.com/11225871](http://www.CPAPracticeAdvisor.com/11225871)

### SUMMARY & PRICING

Intuit Tax Research for Lacerte and ProSeries directly integrates with both tax preparation software packages. The tax research product is web-based, but is easily launched from the two tax programs, and tax research documents can be attached to a client's file in the tax programs with one click. The program features Google's powerful search technology to help users find an answer quickly. Tax research materials are powered by BNA and include Federal and state code, IRS publications, court cases, news bulletins, as well as tables, charts and lists.

Intuit Tax Research is a good fit for firms using the Lacerte or Pro-

Series tax preparation software and plan to take advantage of the integration features. The unlimited seasonal (6 month) subscription is offered at \$449 while the unlimited annual subscription is \$849. This price is per firm, not per user. Therefore, Intuit Tax Research may be a good value with multiple individuals using the integrated tax preparation programs.

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## BNA Tax & Accounting Center and Financial Resource Center

Read the full review and see expanded ratings for this product online at: [www.CPAPracticeAdvisor.com/11225895](http://www.CPAPracticeAdvisor.com/11225895)

2013  
OVERALL  
RATING

4.5

### BEST FIT

Tax, accounting, and legal professionals seeking expert analysis and editorial views directly from one of the leading tax content providers.

### STRENGTHS

- Featured content includes Bloomberg BNA portfolios, which are authored by well-respected experts in the profession.

- Fast Answers is in an easy-to-use Q&A format, and may be the fastest way to find an answer to a common tax question
- Interface and layout is easy to use and ideal for tax professionals who read or research by topic

### POTENTIAL LIMITATIONS

- Does not natively integrate with any leading tax preparation software.

- There is no mobile version of the BNA research website, though the full site can be used on mobile devices.
- Mobile app provides access to Portfolio analysis, news, and primary sources, but is only available for iPhone and iPad.

materials to tax and accounting professionals, highlighted by the expert analysis found in the BNA Portfolios. Basic subscriptions start at \$800 with additional fees for adding other user logins. Prices start at \$3,000 for subscriptions with the U.S. Income Portfolios.

### SUMMARY & PRICING

Bloomberg BNA Tax & Accounting Center provides extensive research

[www.BNASoftware.com](http://www.BNASoftware.com)

## CCH IntelliConnect

2013  
OVERALL  
RATING

5

### BEST FIT

Tax, accounting and legal professionals needing a comprehensive research solution, particularly those doing a significant amount of research on mobile devices, using CCH ProSystem *fx* Tax, and internally collaborating on research projects.

### STRENGTHS

Integration with CCH ProSystem *fx* Tax and CCH Axxess

- Among the products reviewed, IntelliConnect is the only one to provide nearly all of its content and functionality through a mobile app.
- Content on the mobile app may

be easily converted to PDF, e-mailed, or shared to social media sites.

- Tabs built in to the interface allows multiple documents to be open at the same time and makes it easy to move between documents.
- Allows greater collaboration by highlighting text, adding notes, and sharing research folders with selected colleagues.

### POTENTIAL LIMITATIONS:

- CCH Mobile is not currently available for Windows Phone and Blackberry devices, however, they may use mobile versions of the IntelliConnect site.

Read the full review and see expanded ratings for this product online at: [www.CPAPracticeAdvisor.com/11225880](http://www.CPAPracticeAdvisor.com/11225880)

### SUMMARY & PRICING

IntelliConnect is the web-based research platform from CCH, a Wolters Kluwer business, providing tax and accounting professionals with tax news, journals, tools/smart charts, forms, and many other resources for research. New features include a redesigned home page, the ability to share research folders with colleagues, and the ability to add notes and highlight text.

IntelliConnect subscribers can access tax news and research tools with CCH Mobile, which is available for iPad/iPhone, Android devices, and Kindle Fire HD. The mobile app provides much of the functionality found in the desktop site. Users can

save documents to folders, save documents to PDF, e-mail documents, and also copy and paste text. Recent enhancements to the mobile app include the ability to e-mail documents to mobile device contacts and share news directly to Facebook, LinkedIn and Twitter.

Tax and accounting firms of all types and sizes use IntelliConnect for its wide range of content. Library subscriptions start at \$200, with additional fees for adding users or content. CCH Mobile is free to download, but requires an IntelliConnect ID and password to use the app.

<http://intellconnect.cch.com>

## Thomson Reuters - Checkpoint

2013  
OVERALL  
RATING

5

### BEST FIT

Tax and accounting professionals needing a research solution with strong search and customization tools, particularly those using Thomson Reuters tax preparation software.

### STRENGTHS

- Among the products reviewed, Checkpoint has some of the more intuitive and comprehensive search functions.
- A feature unique to Checkpoint among the products reviewed is time tracking. Time spent on projects can be printed or export into time and billing systems.
- Although login sessions time out

after an hour of inactivity, a user may quickly return to previous research upon logging in again

- Speedlink tool provides fast access to research

### POTENTIAL LIMITATIONS

- Thomson Reuters does not offer mobile apps with the full Checkpoint content, however, mobile versions of the site open on smartphones and tablets.
- Document Assembly is supported on the tablet version of Checkpoint, but not Checkpoint for Smart Phones. The user has the option to go to the full site on the mobile and can use Document Assembly there.

Read the full review and see expanded ratings for this product online at: [www.CPAPracticeAdvisor.com/11225839](http://www.CPAPracticeAdvisor.com/11225839)

Thomson Reuters Checkpoint is an online tax and accounting research resource widely used by accounting professionals and students. New features introduced during the past year include the Export Tray which runs exports of larger Checkpoint documents in the background, allowing subscribers to continue research during the process, and the option to access documents, searches and tools from previous research sessions. New products recently introduced include the AAEL International Trade News Alert, FASAB Standards, a Non-Discrimination Testing Tool and the monthly Puerto Rico Tax News-

letter. Also, a tool to identify state and local tax credits and incentives was recently released, which is searchable by address or jurisdiction.

### SUMMARY & PRICING

Thomson Reuters Checkpoint provides a strong and easily searchable research platform for accounting professionals with highly respected proprietary content and third-party resources. Prices range from \$100 into the thousands depending on the libraries and subscription quantities selected.

<http://cs.thomsonreuters.com>

# 'Tis the Season for Tech 2013 Holiday Gift Guide

By Isaac M. O'Bannon, Editor

**T**he holidays are here ... almost. Fortunately, there's still time to shoo away the Grinch and find some unique tech gifts for your friends, family, coworkers or even just a new toy for yourself.

While thoughts of holiday gift-giving often conjure up visions of the latest personal entertainment gadgets and toys, practical gifts for workplace productivity can also brighten a professional's mood, especially if it can save them time or stress.

Our tech-focused readers will surely enjoy this year's gift guide and, hopefully, so will the people who receive the gifts.

From everyone at *CPA Practice Advisor*, We wish you the Happiest of Holidays and a prosperous New Year.

## **A** TURN YOUR WORKFLOW DIGITAL IN A SNAP

Even in the modern paperless office, there is still paper coming in, even if the end product you produce is totally digital. The most effective way to turn paper-based documents into the digital workpapers your firm depends on is to use a next generation scanning solution like those in

the **ScanSnap** line from **Fujitsu**. Whether a pocket-sized mobile scanner like the **S1100**, a portable scanner like the **S1300i**, a desktop model like the **iX500**, or the **SV600** contactless scanner, ScanSnap products and the built-in document automation software can help bring some stress relief year-round. (From \$199; [www.fujitsu.com/us/services/computing/peripherals/scanners/scansnap](http://www.fujitsu.com/us/services/computing/peripherals/scanners/scansnap))

## **B** ONE FOR THE ROAD

When they're on the road and living with their laptop, mobile professionals often miss the productivity boost they get from a multiple monitor setup on their desktop. Now, they can take an extra monitor with them. The 16" **AOC Portable USB Monitor** is perfect for presentations or everyday work, giving users a simple way to add a monitor. And, since it gets its power through the same USB cord that connects the

video screen into the laptop or desktop computer, there's no need for a separate power cord. (From \$99; [aoc.us.com](http://aoc.us.com))

## **C** SERIOUS GRILLING REQUIRES SERIOUS GEAR

The serious outdoor chef is always prepared, and with the **Tactical BBQ Apron**, he or she will also have quick access to the gear needed for any grilling mission. Instead of digging through piles of tongs, spatulas, thermometers and other BBQ tools, they can be properly assembled onto the MOLLE system that holds everything the grill master requires. Includes multiple pouches, adjustable side straps, Velcro patches and compartments for storing secret spices. (\$34.99; [www.thinkgeek.com/product/11cd](http://www.thinkgeek.com/product/11cd))

## **D** PAMPER YOUR GADGETS

If you carry the latest iPhone or iPod, you want to not only keep it protected, you also want to keep it stylish and wearing a case that reflects your tastes. The **Leather Collection** of cases for iPhone 5s from **Adopted** features three distinct case styles: frame, wrap and folio. All are crafted using full-grain genuine leather and patent pending metalized frames for maximum

protection and style. (From \$39.99; [www.GetAdopted.com](http://www.GetAdopted.com))

## **E** GAMING GEAR RE-MASTERED

The gaming scientists at **ROCCAT** have taken the old-school three-button mouse and juiced it up with some advanced features to create the **Lua**. With a user-adjustable Pro-Optic sensor, a rugged, ambidextrous shape, no-sweat side grips and a soft-touch surface, the Lua gives gamers more precise control and the ability to instantly switch speeds in the heat of battle. (\$29.99; [www.roccat.org/Products/Gaming-Mice/ROCCAT-Lua](http://www.roccat.org/Products/Gaming-Mice/ROCCAT-Lua))

## **F** ADD A POCKET TO YOUR PHONE

Mobile technology has nearly made carrying a bag or thick wallet a thing of the past, but you still need a place to carry your ID, credit cards or a few dollars. The solution: The **Q Card Case** from **CM4**. Featuring a lay-flat screen guard for ultimate protection, a soft-touch finish and a pocket with room for three cards plus cash, the Q Card Case is available in multiple colors and styles that fit iPhone 4/4s, iPhone 5/5s and the Samsung Galaxy S4. (\$39.99; [www.cm4.com](http://www.cm4.com))



## G GET YOUR PULSE UP

Whether you're a casual walker or a hardcore outdoor enthusiast, or even just busy rushing between stores during the holiday shopping season, now there's a way to keep better track of your lifestyle. The **Pulse** from **Withings** helps you be more active and measure it, by capturing all the details from steps taken, calories burned, elevation climbed and distance traveled. It syncs to smartphones or tablets so you can put the information into perspective. (\$99.99; [www.withings.com](http://www.withings.com))

## H SLEEK & RUGGED

Is your phone prepared for the real world? The **Hydra Series** of mobile phone cases are "designed to survive life," and feature waterproof, dirt proof, dust proof and impact resistant designs. With the Hydra, even if your phone falls into 7 feet of water for 30 minutes, or falls from up to 8 feet onto a hard surface, it is protected. It also comes with a rugged holster, scratch and impact resistant screen protector, Reinforced Ballistic Corners and a slim design. (\$79.99; [www.GoBallistic-Case.com](http://www.GoBallistic-Case.com))

## I AUDIO WITH ATTITUDE

When your music stands out in a crowd, you want your headphones to match that same personality. With a retro feel but the latest in audio tech quality, **Evac** over-ear headphones from **Wicked Audio** goes against the conformist grain

and will let its wearer fully slip into the music corner of their mind. (\$49.99; [www.WickedAudio.com](http://www.WickedAudio.com))

## J THE GIFT OF A GREEN THUMB

Not everyone was born with a green thumb, but now even the non-savvy gardener can enjoy a real house plants that automates all of its own watering and feeding. Even better, they produce herbs to enhance your cooking. The **Click and Grow** is an easy-to-use electronic "smartpot" that grows real herbs and flowers, and automatically measures and applies the right amount of water, fertilizer and air based on the plant's needs. ([www.clickandgrow.com](http://www.clickandgrow.com); \$79.99 starter kit; \$19.99 for additional plants/refills.)

## K MAKE YOUR TV SMARTER

The latest generation of televisions are enhanced with the latest in interactive tools, but what if you're not ready to get rid of your T.V. that's only a few years old, but you still want internet on your T.V.? Fortunately, the **SmartStick TV Streamer** makes it easy, without the need for a clunky box or tangled cables. Simply plug the SmartStick into the USB port on your T.V., and you can quickly access various television and entertainment apps, including Netflix, Hulu Plus, ESPN, Vudu, Facebook, Twitter and even Angry Birds. (\$49.99; [www.favientertainment.com](http://www.favientertainment.com))

## L KICKIN IT, IN STYLE

Whether you want to pump up the bass or mellow out to some classical tunes, the **i-Mego Throne Cambo** over-the-ear headphones offer outstanding audio quality and performance, along with eye-catching design innovations that combine to provide unique and stylish headgear. (\$79.99; [www.i-mego.com](http://www.i-mego.com))

## M THIN IS IN ... FOR YOUR KEYBOARD, TOO

From cell phones to tablets, sleek is chic when it comes to mobile tech. Now that same thin style is available for iPad users with the Bluetooth 3.0 **Rapoo E6300**, an ultra-thin wireless keyboard that offers the tactile benefits of typing on a real keyboard instead of a touch screen. The compact keyboard can easily fit in a pocket, briefcase or carryall, making it a convenient accessory to your must-have tablet. (\$49.99; [www.rapoo.com](http://www.rapoo.com))

## N THE MODERN BOOQ BAG

Not all professionals want to lug around a laptop case or briefcase, which is why the creative geniuses at Booq have designed the **BOA Squeeze**, a laptop backpack that includes dense padding to protect your electronics, along with enough pockets for all of your other gear. The durable, water-repellent ballistic nylon is loaded with additional features, and it's slim design will

enhance your style. It's a Booq-bag, get it? (\$129.95; [www.booqbags.com](http://www.booqbags.com))

## O EXTREME PROTECTION

Protecting your iPhone is important, but it can be a real challenge for those who venture into extreme environments. The **SLX-treme5** is up to any challenge, sporting a waterproof, rugged design, the case for the iPhone 5/5S also includes a solar-powered battery to keep your phone going longer or to charge it in emergency situations. With a military specification certification rating of 810G, it can protect your phone from 6 ft. (2m) falls, dust and sand and a waterproof rating of IP-68 for up to 6 ft. (2m) depths. (\$149.99; [www.snowlizard-products.com](http://www.snowlizard-products.com))

From everyone at  
*CPA Practice Advisor,*  
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of Holidays and a  
Prosperous New Year.





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# How Important is Your Firm's Website?

**It has been a while since this column has covered the importance of your website and the use of web technologies. Let me be as clear as I can: you must have a clear web strategy, an elegant website that runs in browsers, smartphones and tablets, has clear branding for your firm, integrates social media, and all around is an easy place to do business with your firm. Those needs are pretty easy to say. You may have a few more items to add or some things to remove. But the real trick is how to get a really great website built and maintained.**

## Your Website is Your Office Front Door

I don't know who said this first or who to attribute this analogy to, but in today's market, it is true. How many of you use a phone book to look up a phone number? Most of you have critical numbers stored in your smartphone or use a web search to find a phone number. How many of you look on the web for information about a potential client or competitor? You probably do this almost every day. If you have a question, don't you frequently "see what Google says?" And, if your search

habits are like mine, when you go looking, you only look at the first few pages of web search results or you specifically visit a known good site as your source of information. You check a few websites to see if they are legitimate if you are looking for something, or you wind up directly on the firm's website that has the information you want.

As new, younger, clients look for services, they are often turning online. Potential clients with more specific needs are also using Internet search to find new sources of expertise. What does your CPA firm look like on the web? Does your site look professional and offer broad functionality and client collaboration? Is it still in the 90's acting only as a yellow page listing? Is your web front door and first impression inviting and responsive? Think about this. How often do you visit a firm's website before you go to see them? Do you physically visit many businesses today? How many of your supplier's businesses have you been in? When was the last time you turned to a phone book to find business services?

Most of us have built our firms based on relationships. Some have built a reputation around a specific expertise. Others have grown the firm based on service levels. All of these strategies are still extremely important, but a new factor in the last 15 years is being found on the web. Many of us are not trying to build a national accounting firm, but simply

want a dominant local presence. We want to be found in our own market when businesses are looking for accounting services. Being found in your local market is a technique known as local search engine optimization (SEO). If you search on accountant or CPA in your home town, and you don't find your firm or yourself on the first page, or better yet in the first two to three results, you have some work to do.

yourself through social media. If you have a relatively static "yellow page" website that merely lists team members and services, you are highly unlikely to attract new business to the firm. That approach is "so" last decade.

Before explaining the options available, consider your website as it stands today. Would you be pleased and honored to have unknown guests visit your site? Does it represent the quality and values of your firm? Is your site understandable? To test this, ask your family members, friends or non-employee associates to evaluate your site with you. Although this is clearly an amateur approach, it will give you an immediate sense about the issues with your site. Consider your goals for the firm's website. Are these clearly communicated and accomplished? What do you want the website to do for your firm? If your current website is

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THERE ARE CLEAR FACTORS THAT MAKE CERTAIN WEBSITES STAND OUT MORE THAN OTHERS: DESIGN, READABILITY, EASE OF NAVIGATION, LOADING SPEED & PERFORMANCE, ABILITY TO BE FOUND BY SEARCH ENGINES, LOCALIZATION INCLUDING LOCAL SEARCH, AND THE ABILITY TO RUN IN DIFFERENT BROWSERS ON DIFFERENT DEVICES.

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There are clear factors that make certain websites stand out more than others: design, readability, ease of navigation, loading speed & performance, ability to be found by search engines, localization including local search, and the ability to run in different browsers on different devices. Your website should support your firm's business model, and that may well include portal capability, integration of online accounting, news feeds and content that you produce

accomplishing everything you want it to, well, excellent for you! If not, you are now ready for a conversation with a website professional.

You can acquire or build websites multiple ways, but there are three methods that dominate. The first is to obtain a site from a provider that has canned content and templates, usually for a small upfront fee and a relatively low recurring monthly expense. Most tax and accounting firms take this approach since it car-



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ries the least expense. Examples of this approach include CCH ProSystem fx Site Builder, Thomson Reuters Web Builder CS, AccountantsWorld Website Relief, Build Your Firm, CPA Site Solutions, CPAsites, etc. You can find comparative information at [www.websites4accountants.com](http://www.websites4accountants.com).

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

unavailable for maintenance or updates.

The third method involves a hybrid of the two other approaches, where professional design and marketing is used on a site and content updated inside these wireframes or designs. You maintain or provide the updated content. Sites built with this technique are cleaner with clearer messaging than the template sites using canned content. Examples of these types of sites include the work being done by the RootWorks Web Development team or BOP Design.

Read and learn more by checking out the online version of this article at: [www.CPAPracticeAdvisor.com/11216438](http://www.CPAPracticeAdvisor.com/11216438). ●

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***The only cost you will have is if you don't act!***



# 2014 EXECUTIVE PREDICTIONS YEAR IN REVIEW 2013

**O**ne unique thing about the culture at BQE is that we are never comfortable with the status quo. That feeling forces us to think outside the box and develop intuitive and rich business applications. While most technologies companies are working hard to move their products to the cloud, we at BQE continue to work on products and solutions that go beyond cloud computing.

## 2013 accomplishments that we at BQE are proud of:

1. BillQuick 2013 was released with amazing business intelligence functionality and powerful yet easy to use revenue forecasting features. All in all we added over one hundred new features in our 2013 flagship product.
2. We continue to enrich our mobile applications. New versions of iOS and Android apps were released. End users capture time and expense with fewer touches and attach receipts to expense entries. To add to our Anytime, Anywhere, Any Device mission, BQE released our native Windows 8 Phone app in the third quarter.
3. This year we added more new users to our products and solutions than any year before. This has not only helped us expand our user base, but also improve our revenue by 34% compared to last year.
4. Less than ten years ago BQE operated from a space that was less than 200 square feet. This year we signed a new lease to move our office for the third time to a brand new 20,000 square feet space. This new and bigger office space enables us to increase our staff strength and serve our fast growing customer base even better.
5. This year started with the prestigious 2013 *CPA Practice Advisor* Reader's Choice award. We were also honored to receive the Stevie's 2013 Gold Award for the Business Application of Year and People's Choice Award for our forecasting and business intelligence. And recently, BillQuick received a five star review by *CPA Practice Advisor* magazine. The recognition from our customers and independent reviewers has been truly priceless.

## 2014 Predictions:

1. More businesses will switch to Windows 8 platform now that the 8.1 version is out and has succeeded in solving some of the friction points and restored the Start button.
2. The migration to cloud-based SaaS products will continue its growth. However, the growth will not be different than 2013. Simply, most cloud alternates are poorly designed and often frustrating to use. The good news is some emerging technologies will allow developers to create browser-based applications that are robust, responsive, and faster than their desktop counterparts.
3. Now that Apple is giving away their iWorks and iLife products for free, expect Microsoft and others to follow. This means more infrastructure building and higher P/E ratios.
4. Get ready for a barrage of new mobile and tablet-based applications from software developers. We at BQE have been working on a few ourselves and I can't wait to see them hit the marketplace.

### ABOUT BQE SOFTWARE

BillQuick® by BQE Software is the leading time & billing, and project management software for small to mid-sized firms. With over 300,000 customers, it's the trusted solution that CPAs, accountants and other professional services firms depend on every day. BillQuick streamlines your time & billing processes, increases profitability, and helps you make better business decisions with real-time data. It integrates with QuickBooks, Peachtree, MYOB and Outlook.

Add-on products for BillQuick include:

- Web-based anytime, anywhere access via BillQuick Online cloud service or self-hosted Web Suite.
- Free, native iPhone and Android Apps that allow Web Suite and BillQuick Online customers to enter time and expenses seamlessly from their phone.
- BillQuick HR to efficiently track staff's sick and vacation time.
- BillQuick Outlook Add-In to record all appointments, tasks and correspondences created in Outlook as time entries.
- BillQuick Agent to quickly view your company's financial state and make accurate business forecasts.

SHAFAT QAZI  
CEO and Founder,  
BQE Software



For nearly two decades, Shafat Qazi, the CEO and Founder of BQE Software, has worked with professionals in service-based businesses such as accountants, attorneys, architects and engineers to develop solutions to help them achieve greater efficiency in the management of time, expenses, billing and projects. Shafat has a passion for technology and

possesses an innovative and forward thinking mindset that is reflected in the time and billing solutions developed by BQE. Examples of this include the implementation of workflow automation and the use of Fuzzy logic (i.e., Artificial Intelligence) to create software that actually learns as it's used. Not content to just solve the current needs of BQE's

customers, Shafat is always looking to create solutions for future demands that may arise from the latest technological innovations and changes in the industry BQE serves.

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## Peering into the Future, Pioneering Steps to Success

**A**t this pivotal time in our industry when advanced technology and changing client needs are guiding critical decisions being made by many accounting professionals, they are facing more choices on how to grow, manage and protect their businesses than ever before. Not only are cloud-based solutions, such as CCH Access™, influencing which leading-edge technology levers firms should pull to ensure brighter futures, but peer and competitive pressures are also determining how quickly they are adopting new technology — are you a Pioneer firm or are you destined to follow in the footsteps of others who've already taken the leap ahead?

Then consider what's shaping up as parallel future tracks for firms to follow when it comes to workflow. We are looking at the dawn of an age where workflow enhancements are progressing down one path while the order and fundamental nature of workflow that directs when and how you do things is in the infancy of undergoing a dramatic change. It's not about improving workflow, but defining what workflow is becoming.

Although there are many different paths to future success, the goals remain the same for everyone heading into 2014:

- Driving the "wow" factor of enhancing the guidance, advice and overall value for supporting clients.

- Boosting efficiency while shrinking the response time in getting back to clients — leveraged through enhanced mobility that integrates cloud solutions with powerful content resources, such as CCH Mobile™ and portable tools for working anywhere and anytime, including CCH's e-File Status app.
- Enriching and improving communication. Engaging clients and staff with new-age social media tools and empowering greater access for clients to receive information through digital and secure channels offered through CCH Access™ Document and CCH Access™ Portal.

Client expectations have fundamentally shifted and will continue evolving in 2014 and beyond as technology and constant innovation make more things possible by significantly impacting workflows. Smart firms will thrive by evolving with these trends and making their services more "consumable" and easier for clients.

We also can expect to see greater segmentation of where firms decide they want to be on the hierarchy of success.

A new CCH white paper, *CPA Firms Succeeding in the New Economy* featuring results from the *CCH Leaders Now and Next Survey*, details how Pioneer firms — those first to adopt new technology and willing to risk early pain points before enjoying the benefits of being

the earliest to leverage advanced solutions — are becoming more profitable and successful than firms falling into the categories of:

- Early Adopters — Those who first rely on feedback from Pioneers before adopting new technology.
- Mainstream — Firms willing to wait on new technology until solutions become more popular with their peers.
- Late Adopters — Having tendencies to hold off on adopting new technology until current solutions are phased out and no longer supported.

To find the right path, firms must align what their specific needs are. However, the leap into technology doesn't have to happen all at once.

The demand for common data solutions is bound to increase in the near and distant future. Firms want solutions that work together to streamline processes so they can focus on providing the highest level

of service to their clients. A true cloud-based solution can provide this through common data and services that are shared across their mission critical applications. For instance, CCH Access offers a centralized setup and maintenance of common data which includes client, staff and firm information accessed by all the applications. What this means is that you only have to set up clients once on a single, integrated database and they are immediately available across all the CCH Access modules including tax prep, workflow, practice management, document management and portal.

So we are looking at a future of firm uncertainty on paths to growth combined with industry advances and pressures that factor into their decisions. And in this era of rapid industry change and development — today's decisions on technology as well as staff recruitment and succession planning, may strongly impact firm performance well beyond the next 12 months.

### ABOUT CCH, A PART OF WOLTERS KLUWER:

CCH, a part of Wolters Kluwer, is a leading global provider of customer-focused tax, accounting and audit information, software and services. As a strategic partner, CCH helps professionals advance their business through solutions that support the workflows of CPAs, corporate tax and accounting departments, tax attorneys and auditors. CCH's award-winning solutions are delivered in a wide range of media to ensure professionals can serve their clients anywhere, anytime. Among our market-leading solutions are CCH Access™, the ProSystem fx® Suite, IntelliConnect®, Accounting Research Manager® and the U.S. Master Tax Guide®. To learn more, please visit our website at [CCHGroup.com](http://CCHGroup.com).



**TERESA MACKINTOSH**  
President & CEO of  
CCH Tax & Accounting, U.S.

Teresa Mackintosh, CPA, is President and CEO of CCH Tax & Accounting U.S., a position she has held since October 2013. She joined the organization in 2012 as Executive Vice President & General Manager of Tax — leading CCH's largest business serving tax

professionals with innovative and customer-focused solutions. In this role, Mackintosh led CCH's Tax Product Development, Tax Technology, Product Management, Sales and Tax Operations teams.

An experienced leader with more than 18 years in the information, technology and software industries, Mackintosh has held numerous executive leadership positions in strategic

marketing, product management and business development. She is consistently recognized as one of the Top 100 Most Influential People in Accounting and a Top 40 Under 40 leader in the profession, and has been named to the Most Powerful Women in Accounting list.





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# 2014 EXECUTIVE PREDICTIONS YEAR IN REVIEW 2013

## 2013: Continued Growth & Improvements

**A**s we close out 2013, I am reminded that Cloud9 Real Time is not only in the business of moving businesses to the cloud, but we are also a resource businesses look to for how to cost-efficiently operate their companies.

APPLICATIONS DOMINATE - names such as Salesforce.com have enabled customers to self-provision services of the Internet. There is an app for almost anything you need or want. No doubt we're all a little tired of hearing about apps.

SECURITY LEVELS INCREASE & TRUST GROWS - business owners have been worried about cloud security since banks started offering online banking in the 80's. There are a variety of opinions about how secure 'the cloud' is for businesses to use, but one thing is for sure, Cloud9 has invested hundreds of thousands in network monitoring, security, privacy and new storage technology over the last year to make your cloud a more private, secure place.

DIFFERENT USES FOR PUBLIC AND PRIVATE CLOUDS - Cloud9 has helped thousands of businesses provision a private cloud and that trend is continuing to grow. Savvy business buyers now understand that self-service, public cloud models like Amazon's AWS and Microsoft's Azure have their place for technical users, but are not for the general business owner looking to have a way to set up their office or part of a department in a private cloud.

## 2014 & Beyond: Intelligent, Anytime, Any Device

INFRASTRUCTURE AS-A-SERVICE GROWS - now that an increasing number of businesses are comfortable with using apps in the cloud, it's only natural they are trying to figure out how to move their other technology to the cloud. Business owners are really seeing the benefit to having companies like Cloud9 host their server capabilities in the cloud.

CLOUD MANAGED SERVICES - if your business has access to its software applications, data and servers in one location in the cloud, it's only natural that you would entrust companies like Cloud9 in providing additional services that add value - like disaster recovery, easy to use online helpdesk support, and other aspects of managing your technology. You should also see more experienced IT service providers leveraging cloud technologies from strong players like Cloud9.

CLOUD INTEROPERABILITY AND COLLECTIVE INTELLIGENCE - now that most businesses run between 3-10 apps to operate, it will only be a matter of time before it will be important that all those apps share data and give visibility on performance from a single location, but first we'll have to figure out how to integrate those apps.

### ABOUT CLOUD9 REAL TIME

Cloud9 Real Time is an Accredited Managed Service Provider delivering dynamic Cloud Solutions for Anytime, Anywhere access. Licensed by both Intuit and Sage for Commercial Hosting and offering a customized, privately labeled all-in-one virtual office solution.

**ROBERT J. CHANDLER**  
President/CEO  
Cloud9 Real Time



Robert Chandler is an acknowledged industry visionary and leader in Cloud technology. He was honored with the award of "Top 40 Under 40" by the CPA Practice Advisor Magazine in 2007, 2008, and 2010.

He is also a leading national advocate of modern accounting methods that include universal Internet service with remote access to client files, outsourcing of bookkeeping work, automated accounting systems and techniques, professional certification for all bookkeeping practitioners, and Cloud computing advancements.

He is a sought-after speaker for Accounting and Technology conferences nationwide, and is actively involved in moving the accounting industry forward with advancements in technology.





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“Since switching to Cloud9 Real Time, we’ve reduced our costs, increased reliability for remote workers, and increased the speed of our accounting systems. Thanks Cloud9!”

– Doug Sleeter, Founder, The Sleeter Group, Inc.



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# 2014 EXECUTIVE PREDICTIONS YEAR IN REVIEW 2013

## Time to Embrace the Virtual Office

**N**o longer will anytime, anywhere be the up-and-coming way to operate a business, it will be the expectation for accountants and subsequently, their clients. With mobile technologies and cloud programs readily available, accounting professionals are expected to receive emails, send invoices and file tax returns from their cars, the airport, even soccer games.

As the cloud moves from a "new" technology to a needed commodity for accountants, it has helped improve client collaboration, allowing accountants to improve data collection and leverage electronic systems to help manage and execute work for their clients. Gone are the days of faxing and re-entering data into multiple programs. Intuit has long focused on leveraging the cloud to create greater efficiencies across the workflow for accounting professionals. For example,

we provide a connection between our QuickBooks Online Accountant edition and Intuit Tax Online so there is a seamless integration between accounting and tax. In 2014 and beyond, this will only continue to improve, and will open to more products and services, cutting down on the time it takes to do data entry.

As we move into the New Year, it's time to embrace the cloud. SaaS solutions are here, and accounting firms need to begin incorporating these solutions in their practice to gain efficiency and better serve their clients. Accountants should think about when their clients are interacting with other service providers, and ensure they can meet those clients' expectations. On the go access, mobile collaboration, convenient and easy-to-use self-service tools (like portals) will enable accountants to not only better manage their practice, but also better serve their clients.



### ABOUT INTUIT:

Intuit Inc. creates business and financial management solutions that simplify the business of life for small businesses, consumers and accounting professionals.

Its flagship products and services include QuickBooks®, Quicken® and TurboTax®, which make it easier to manage small businesses and payroll processing, personal finance, and tax preparation and filing. Mint.com provides a fresh, easy and intelligent way for people to manage their money, while Demandforce® offers marketing and communication tools for small businesses. ProSeries® and Lacerte® are Intuit's leading tax preparation offerings for professional accountants.

Founded in 1983, Intuit had revenue of \$4.2 billion in its fiscal year 2013. The company has approximately 8,000 employees with major offices in the United States, Canada, the United Kingdom, India and other locations. More information can be found at [www.intuit.com](http://www.intuit.com).

Website: [intuit.com](http://intuit.com)  
Phone Number: 800.446.8848

**SAMIR KHOSLA**  
Director of Product Management



Samir is an Intuit veteran of 11 years and currently leads the company in managing all accounting-based products for professionals, both online and desktop. In this position, Samir holds two roles; one as a thoughtful and innovative product manager for the division and the other as a customer advocate, so he is able to better understand what types of products and services accounting professionals want and need.

As Director of Product Management, Samir is best known for furthering the development

of top Intuit accounting products, including QuickBooks Accountant Edition and Intuit Statement Writer. In addition, Samir is constantly thinking about the future and working on original and creative products to exceed the expectations of accounting professionals, and ultimately, better serve their wants and needs. As the winner of Intuit's CEO Innovation Award for his work related to the development of Client Data Review within QuickBooks Accountant, Samir continues to lead the charge by developing products and services needed to

take accounting professionals to the cloud.

Samir holds a degree in Engineering from Pennsylvania State University and a Masters in Business Administration from Stamford University. In both 2011 and 2012, CPA Technology Advisor selected Samir as a "40 Under 40" leader. Outside of work, Samir loves to play volleyball and basketball, go hiking and travel the world with his wife and two young children.

We know accountants are big on numbers.  
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\*1.3 million based on number of users from paying QuickBooks Online companies worldwide, May 2013. Leader in cloud-based accounting based on number of paying QuickBooks Online companies worldwide, May 2013.



# 2014 EXECUTIVE PREDICTIONS YEAR IN REVIEW 2013

## Ramping up to an “everything-everywhere” future

**W**hat’s your product? It’s tempting to think that it’s the reviews, audits, tax returns, and other “stuff” that you can hold in your hand. But the truth is, your product isn’t stuff. It’s ideas. Expertise. And above all, client service. Yes, you still need to complete tax returns and provide financial information. But after-the-fact information—the “stuff” of accounting—is getting less and less valuable. We’re moving fast toward a future where data is everywhere, available to everyone all the time.

What will this always-on future look like? The tablets and smartphones we’re familiar with today are just the beginning. We’re already seeing the rise of what experts call “the Internet of things,” where household systems, surfaces, and nearly everything else

will be connected to the cloud.

Client expectations are evolving just as quickly as the technology. Firms need to ask themselves whether they’re providing services in a way that meets these expectations, or whether they’re working to suit a world that no longer exists.

Chances are your clients are already conducting their business and personal lives online, and their habits have changed dramatically since we entered the mobile web computing cycle. They’re constantly connected, and they expect the same from you. This shift was the major driver behind Accounting CS™ Client Access, which creates a constant, instantaneous connection between the firm and the client.

We’re also working on a variety of new features that will enable you to share and profit from data in new ways

while elevating client service. Some recent innovations that I’m particularly excited about include:

- **New mobile tax workflow capabilities** that will redefine the role of mobile devices in tax prep. Firm clients will be able to use their mobile devices to submit source documents year-round. Those documents will be automatically identified and labeled, and data will be extracted using OCR technology. This will create a centralized, automated repository for source documents that will integrate seamlessly with the firm’s tax season workflow.
- **New mobile capabilities in NetClient CS®** that will enable firm clients to snap photos of source documents with their mobile devices, then upload them directly via the firm’s NetClient CS portal. Firm clients

will also be able to send documents directly from Dropbox™ to the firm.

- **New mobile notifications and functionality for firm clients**, including mobile notifications for e-file and refund status, mobile client signature capabilities, and mobile invoicing and bill pay.
- **New integration between Workpapers CS™ and NetClient CS** that enables practitioners to drag and drop client source documents directly to the Workpapers CS binder from NetClient CS. Workpapers CS enables practitioners to manage all types of workpapers, perform sophisticated trial balance calculations, and use comprehensive PDF annotations for digital review.

## Predictions for 2014

**Mobile’s “anytime, anywhere, any device” will give way to “anytime, anywhere, any device, any user interface.”** The next wave of mobile technology is already beginning to break down the boundaries that separate user interfaces and operating systems, and there are more Internet-connected devices than people on earth. Data will be everywhere. Your clients will expect their financial data to be available to them on every device, every interface, all the time.

**You will need to automate your compliance work to keep it profitable.** Compliance work continues to get more commoditized. The good news is, new tools and technology will continue to reduce the amount of time it takes to complete a tax return, prepare financial statements, and the like. Compliance work will still

be table stakes for your firm, and new efficiencies will enable you to maintain your margins while you invest more time in value-added services, client relationships, and other offerings that will help position your firm as a trusted advisor.

**Your clients will question whether they really need you.** They may not ask you this question, but they will certainly ask themselves. The simple fact is that traditional, after-the-fact computation and compliance work is getting less and less valuable.

But the same technology that’s making compliance work less valuable is opening up new opportunities in other areas; analyzing data, forecasting, and providing financial expertise and advice. These services will make you even more valuable to

your clients, they’re more profitable than compliance work, and you already have most of the tools you need to provide them. All you need to do is bring your clients and staff on board.

We’re entering a world of always-on

connections and ubiquitous data. And for firms that stay agile and open to change, it’s opening up a whole new set of opportunities.

### ABOUT THOMSON REUTERS:

For more than 30 years, the Tax & Accounting business of Thomson Reuters has been a leading provider of technology and integrated information for tax and corporate professionals in accounting firms, corporations, law firms, and government.

The CS Professional Suite from Thomson Reuters represents one of the most advanced, integrated suites available for accounting professionals. With leading products that include UltraTax CS®, Accounting CS, Workpapers CS, NetClient CS, and Practice CS®, our products are designed to work together seamlessly, allowing every task to flow efficiently from start to finish and eliminating redundant work. Learn more at [CS.ThomsonReuters.com](http://CS.ThomsonReuters.com)

**JONATHAN A. BARON**  
Managing Director,  
Professional, Tax & Ac-  
counting,  
Thomson Reuters



Jon has more than 35 years of experience providing technology solutions for the accounting profession. Prior to joining Thomson Reuters in 1992, he spent 17 years with Wolters Kluwer, CCH. He was vice president of technology development at Thomson Reuters from 1992-1998 and was responsible for the design and development of the Creative Solutions

suite of products. In July 1998, he was promoted to president and CEO of the Creative Solutions business. In 2004, he was promoted to the position of president of the Professional business unit of Tax & Accounting and today is Managing Director, Professional Segment for the Tax and Accounting business of Thomson Reuters, which focuses

on the accounting, bookkeeping, and tax software market in the U.S. and Canada. Jon holds a bachelor’s degree in accounting from Siena College and an MBA from Boston University.





REUTERS/Bob Strong

# ULTRATAX CS<sup>®</sup>

## COMPLETE MORE RETURNS IN LESS TIME.

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This tax season, it's important to make every answer, every moment count. See why UltraTax CS ranks #1 in a *Journal of Accountancy* survey on tax systems serving the profession. Visit [CS.ThomsonReuters.com/UltraTaxCS](http://CS.ThomsonReuters.com/UltraTaxCS) to see how firms like yours are putting UltraTax CS to work.

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# 2014 EXECUTIVE PREDICTIONS YEAR IN REVIEW 2013

## Technology Bridges the Generation Gap(s)

**2** 014 could be the year that technology adoption reaches a tipping point among tax professionals in small firms.



**CCH Small Firm Services**  
a Wolters Kluwer business

The accelerated adoption of readily available technology – social media, mobile technology, portals – by tax professionals in small firms will be important to bridge a generational gap which exists in two different ways: among clients and among professional staff.

Those clients and potential clients who embrace the latest technologies use social for everything from gathering information to shopping to chatting to sharing photos and information. They consider their smartphones their most indispensable piece of technology. This is an emerging client base that values its time, and they use these technologies to communicate, to bank, to purchase, and to make their lives easier.

The emerging generation of tax and accounting professionals are using portals, mobile technology, and social media to work smarter and faster and more efficiently. They use these technologies to improve workflow, increase productivity, deliver better client service, and improve the bottom line.

Younger consumers – every one of them a current or potential client – expect to be able to work with their service providers using the tools and technologies they are most comfortable using. Firms that adapt and embrace portals and social media, that take advantage of mobile capabilities, will have relevancy and value to those clients. Those firms will also be more attractive to the new,

young talent entering the industry, the very lifeblood of your firm's future.

Across the industry, young tax professionals are exploring new ways to use technology to serve and communicate with clients effectively and with relevance. Those members of your staff who have embraced social media and portals and

mobile technology in their personal lives can lead the way in the office, helping your firm apply these tools to your client relationships. Let them lead. Doing so will not only build bridges between staff members, it will build bridges between your firm and the next generation of clients and position you for future success.

### ABOUT CCH SMALL FIRM SERVICES:

CCH Small Firm Services (SFS), a Wolters Kluwer business, is a provider of tax and accounting software solutions, research products and training to 42,000 small professional firms throughout the United States and Puerto Rico. SFS offers both the ATX™ and TaxWise® product lines. SFS also provides tax software to the Internal Revenue Service for use at volunteer tax assistance sites. SFS, formed in 2006 following the acquisitions of TaxWise and ATX by Wolters Kluwer, is part of Wolters Kluwer Tax and Accounting. For more information, visit [www.cchsfs.com](http://www.cchsfs.com).

**JASON MARX**  
President,  
CCH SFS



Jason Marx was named President of CCH SFS in February 2013. Previously, Marx served as Vice President and General Manager of the Wolters Kluwer Financial & Compliance Services' Residential and Indirect Lending business. A leader with a passion for innovation, a proven ability to drive business growth and a dedication to execution excellence, he is dedicated to understanding customer needs,

finding solutions that make customers more successful, and delivering quality solutions to the market. At Wolters Kluwer Financial & Compliance Services, his focus on deploying technology to create workflow efficiencies that improve profitability and productivity resulted in several award-winning, customer-focused solutions that resulted in significant business growth.

Marx has over 25 years of experience in the Financial Services industry, and is a frequent contributor to industry publications such as *American Banker*, *Mortgage Banking*, and others. Marx holds a Bachelor's Degree in Economics from the University of Michigan. He earned his MBA from DePaul University.

# We have the right software for all your business needs.



CCH Small Firm Services has the **SOFTWARE SOLUTIONS** for your tax preparation practice.

Is your practice year-round or seasonal? Are your clients primarily individuals, businesses or a mix of the two? Are you new to tax preparation or a seasoned veteran? **With ATX and TaxWise, we have the software solution you need** – software that has been used **SUCCESSFULLY** by tax professionals for decades.

You need more than proven tax software to run a successful tax business. CCH Small Firm Services offers a full range **of tools and solutions** to help every aspect of your business.

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At CCH Small Firm Services, our focus is on the tax professional, not the do-it-yourself market. Our mission is to **help you serve your clients and grow your business.** That's all we do. Give us a call at **877-728-9776** and learn more about how we can help you grow.



[www.atxinc.com](http://www.atxinc.com)

[www.taxwise.com](http://www.taxwise.com)

[www.portalsafe.com](http://www.portalsafe.com)

# Websites & E-Marketing Tools Are Essential For Modern Firms

**M**any firms are effectively using digital marketing to tap into lucrative niche markets and services worldwide, and are leveraging their industry experience to provide better client service. While firms historically grew by serving a wide range of local clients, many are now focusing on providing expert services to a much more narrow range of vertical industries over a larger geographic area. Although this requires some travel for occasional face to face meetings, much of the interaction can be handled over web sites, portals, e-mail, cell phone and video chat from anywhere. This change in strategy provides more expertise to clients and better revenue opportunities for practitioners, and is being used by many firms across the country.

As we move to a global marketplace for professional services, there is no substitute for a good website. Just as the previous generation invested in phone book listings and country club memberships to meet clients, every firm must have a website to be considered credible. The quality of the content on the website is used by prospects and clients to evaluate the knowledge and competence of the firm, and is important to a good first (and subsequent) impressions.

We reviewed seven tools for building a firm's web presence for 2013. Those services are:

- 1) AccountantsWorld Website Relief
- 2) Build Your Firm Website and Internet Marketing
- 3) CCH Prosystem fx Site Builder
- 4) CPA Site Solutions
- 5) GetNetSet Websites for Accounting Firms
- 6) Tenenz AFSB Accounting and Financial Site Builder
- 7) Thomson Reuters Web Builder CS

Some of the features which should be considered include:

- Is the application hosted in a commercial data center with backups, redundant power and internet connections? Are the servers monitored and secured 24x7x365?

- Are staff e-mail accounts and secure client portal solutions included with the website?
- How tightly does the website integrate with the firm's client portals, content subscriptions and appointment calendars? Does the website serve as a dynamic digital reception area for clients and prospects alike, or is it simply the web version of an out-of-date paper brochure held over from the last century?
- Is the website creation tool easy to use for novices



and yet flexible enough for those with advanced requirements?

- How many site templates are available, and do they present the image which the firm would like to portray to clients and prospects?
- Does the service offer custom template development and, if so, what are the short term and long term costs of such development?
- Can users enter keywords, descriptions and other information for search engine optimization without entering and tagging them manually in the code for each individual page?
- What kinds of basic search engine submission, advanced keyword optimization services and other services (e.g. pay per click campaigns) are supported by the service?
- Is any syndicated content provided as part of the

subscription? Are custom content and client-facing tools for niche industries and practice areas available from the provider or an industry partner?

- What, if any, integration is available between the firm's website, blogging tools and social media presences?

Significant efforts are required from both practitioners and their marketing consultants to create an effective website using any tool. These marketing efforts can be hindered with solutions which are inflexible, difficult to use, or include stale template designs. Websites have evolved significantly since the 20<sup>th</sup> century and if you are using an old tool like Microsoft FrontPage, it's time to move on to a modern toolset with stronger features and better security.

A firm's website is one of the least expensive ways to make a good impression on clients and prospects. Just as one would not wear a tank top and cutoffs to a new client meeting, a poorly designed website with weak content does not put forth an image of competence, stability and attention to detail. Your website should be like your wardrobe – it should have seasonal, professional content which is appropriate for your audience.

Firms must find tools which meet their needs and helps them communicate their personal sense of style and professional philosophy to a wider audience so they

can attract the right clients. A well-designed site can which help the firm and its partners achieve their goals. Selecting, updating and maintaining your website is a significant part of your firm's image to the public. Those who ignore or neglect this critical communication tool make it much harder for clients and prospects to work with the firm. ●



**Brian F. Tankersley,**  
CPA, CITP, CGMA; Technology Editor

Brian is the Technology Editor for CPA Practice Advisor, and is a frequent speaker at national continuing education courses on auditing and technology, as well as a consultant, coach and instructor for K2 Enterprises. He can be reached at [brian@k2e.com](mailto:brian@k2e.com).

## CCH ProSystem fx Site Builder

### BEST FIRM FIT

- Firms who use CCH applications for client engagements, especially those who utilize ProSystem fx Portal and the product's FileShare module.
- Firms who wish to share syndicated CCH content with clients.

### STRENGTHS

- Good integration with a wide range of CCH products, including ProSystem fx Portal, CCH Tax Guide content, toolkits for Financial Planning and Business Owners, ProSystem fx Tax Notebook, and Gainskeeper Pro.
- CCH tax content can be scrolled across website, and can be customized

to show only targeted states.

- Includes a good newsletter tool with syndicated content, and custom content can be added by the firm to meet the needs of their client base.
- Some of the available templates include page layouts for viewing on either a computer or on a mobile device.
- ProSystem fx Site Builder includes a library of financial tools, web-based calculators, as well as a lead generator module which tracks inquiries from the website.

### POTENTIAL LIMITATIONS

- There is not a simplified blog applica-

tion (e.g. Wordpress, Movable Type) which directly integrates with the application, although this can be added to a firm as a separate domain or subdomain (e.g. firmnameblog.com or blog.firmname.com).

- While CCH has a wide array of templates (70+), creation of a new custom web template is a fee-based consulting service.

### SUMMARY AND PRICING

Pricing is tiered based upon a number of options, with annual subscriptions available starting at \$785 per year. Optional content and toolkits including items such as the Financial Planning

Toolkit, Business Owner's Toolkit, ProSystem fx Portal, and a client-facing Tax Guide are sold separately, with pricing available upon request.

Site builder includes support for both Google Analytics as well as basic tools for search engine optimization. Sites can also include social media icons in the website and e-newsletters to drive contacts to interact with the firm online. Firms can integrated an appointment calendar into the site as well as share financial calculators which have been rewritten to work on most smartphones and tablets.

[www.cchgroup.com/sitebuilder](http://www.cchgroup.com/sitebuilder)

Read the full review and see expanded ratings for this product online at:  
[www.CPAPracticeAdvisor.com/11228491](http://www.CPAPracticeAdvisor.com/11228491)

## GetNetSet Websites for Accounting Firms

### BEST FIRM FIT

- Small firms who would like to have easy integration with a wide range of outside sources such as social media campaigns.
- Prospective users who are already familiar with the WordPress content management system,

### STRENGTHS

- Sites are hosted using the open source WordPress platform, which is used for millions of websites around the world, and is supported by many third-party editing tools and uses open standards like RSS to automatically syndicate content.
- The basic GetNetSet service includes setting up the client on Google+ Local, basic search engine optimization, as well

as white-labeled content for a quarterly client newsletter.

- GetNetSet provides a number of tutorials for using their system, and users can also purchase many third party books and training courses on WordPress to meet their individualized needs.
- Firms can link to their pages on Facebook, LinkedIn, Angie'sList, and Twitter from within the application, or use WordPress plugins to integrate their site with the firms social media campaigns.
- E-mail campaigns can be managed with a simple COPPA/CAN-SPAM compliant web form and a list maintenance tool, or users can integrate commercial e-mail marketing applications like Constant Contact, iContact, MailChimp, and Vertical Response.
- GetNetSet allows users to perform

maintenance on their own website, or users can allow GetNetSet to perform all maintenance at no additional charge.

### POTENTIAL LIMITATIONS

- GetNetSet does not offer significant integration points with other cloud-based accounting tools such as commercial software hosting.
- The entry level plan (the Representer) does not include any type of client portal service.

### SUMMARY AND PRICING

GetNetSet Websites for CPAs and Accounting Professionals are priced starting with the Representer plan at \$29 per month for a limited site with seven pages and firm-provided copy and content. Upgrades are available to the \$49/

month Retainer plan which includes an unlimited number of pages, and a \$99/month Recruiter plan which also includes scheduled statistics reports, a unique landing page, campaign tracking, and other e-marketing features. All plans offer a 30 day free trial, and 10% off for paying annually in advance. Custom development is also available and is billed based on standard hourly rates. There are no setup fees or contracts, and the company offers discounts to members of a number of professional organizations, including the National Association of Tax Professionals (NATP) and the National Association of Enrolled Agents (NAEA).

[www.GetNetSet.com](http://www.GetNetSet.com)

Read the full review and see expanded ratings for this product online at:  
[www.CPAPracticeAdvisor.com/11229604](http://www.CPAPracticeAdvisor.com/11229604)

## Thomson Reuters - WebBuilder CS

### BEST FIRM FIT

Firms who use the Thomson Reuters CS Suite of applications, especially the NetClient CS portals.

### STRENGTHS

- Integrates tightly with other Thomson Reuters services, including NetClient CS client portals and Virtual Office CS.
- The service includes many client-facing tools, including online appointment requests, referral submission forms, financial calculators,

a basic client portal, and moderated client testimonial tools.

- Graphical WYSIWYG interface is easy to use and allows complete administration of a firms website and navigation menus.
- Firms can switch between a range of included website templates, and it is relatively simple to migrate a firm's existing WebBuilder content organized in a different website template.
- Thomson Reuters offers a wide range of optional services, including custom website design, advanced search

engine optimization, niche content, individualized articles, and custom logo design.

### POTENTIAL LIMITATIONS

- The tool for creating and maintaining a blog on the website is a proprietary application, and does not include the ecosystem of add-in modules available with popular blogging tools like WordPress and TypePad.

### SUMMARY AND PRICING

Thomson Reuters Web Builder CS is a full-featured web solution with a number

of options for optional services to meet the needs of most firms. There is no up-front setup costs, and no long-term contracts are required to use the service. New users receive a thirty day free trial. Pricing of the product depends on the options selected, and starts at \$70 per month with no required service contract. Some services, such as custom website design and advanced search engine optimization are individually priced based on customer requirements.

[cs.thomsonreuters.com](http://cs.thomsonreuters.com)

# WEBSITE BUILDERS

## Tenez - AFSB Accounting & Financial Site Builder

Read the full review and see expanded ratings for this product online at: [www.CPAPracticeAdvisor.com/11230774](http://www.CPAPracticeAdvisor.com/11230774)

### BEST FIRM FIT

Firms who are interested in a value priced self-guided, step by step method for creating a site from one of over 140 templates. Also, firms who want to manage their own website using a web-based interface.

### STRENGTHS

- Includes articles, monthly client newsletters, and financial calculators.
- Templates for a wide range of professions are available, including accounting, payroll and tax, financial planning, and legal services.
- A wide array of templates are available at no additional charge, and custom

templates can be created starting at \$250 depending on requirements.

- Includes 20 staff e-mail accounts which can be forwarded to another mailbox or accessed via POP, IMAP, or a webmail interface.
- Tenez has announced some new features for release this fall, including a Client Contact Manager and a Client Portal application. Both will be included at no additional charge in the product.

### POTENTIAL LIMITATIONS

- Although the software allows for an unlimited number of additional pages, the content management is not searchable, potentially making it dif-

icult to manage a very large number of additional pages.

- The company's own website ([www.afsb.net](http://www.afsb.net)) had inconsistent statistics on how many templates were available (some pages said 50, while others said 140), and we were unable to sign up for a trial online due to site limitations.

### SUMMARY & PRICING

AFSB Accounting and Financial Site Builder is a good basic web hosting service for accounting professionals and firms who need a simple internet presence. The service is reasonably priced, and provides value for the price charged. AFSB's basic monthly subscription fee

is \$31.99 and a 20% discount is offered if paid annually (\$299.99/year, effectively \$24.99/month). There are no setup fees or long-term contracts, and every user receives a 60-day free trial. For an optional one-time \$30 fee, AFSB provides search engine optimization and registration services. AFSB also offers site customization and will create a custom templates for a fee that ranges from \$100 to \$250. Customizations or maintenance performed by Tenez are priced at \$100 per hour, with a \$25 minimum charge.

[www.AFSB.net](http://www.AFSB.net)

## CPA Site Solutions

### BEST FIRM FIT

Firms who want to work with a proven solution provider in this space since 1999 and a firm who currently hosts over 6,000 firm websites. Also, firms working with clients using hosted QuickBooks provided by Cloud9 Real Time, which is integrated into the control panel for the service.

### STRENGTH

- CPA Site Solutions offers a huge number of stock templates (95 new templates were added this year alone)

which can be edited in a simple web interface or firms can select the optional custom template design service.

- Includes integrations with hosted accounting applications from Cloud9 Real Time and Intuit Online Payroll, as well as an online tax organizer.
- Sites are designed to work with common browsers and are formatted to render effectively on mobile devices.
- Hosting and data storage is spread across multiple data centers to reduce

the threat of a firm's website being shut down by a denial of service (DoS) attack.

### POTENTIAL LIMITATIONS

- CPASiteSolutions does not offer blog hosting, but the website can be linked to services procured from outside solutions like WordPress or Typepad.

### SUMMARY & PRICING

Pricing is based on three tiers (\$49.50/mo for Silver, \$69.50/mo for Gold, and \$99.50 for Platinum), and the first 60 days

are free on all plans. Each tier requires an initial one year commitment. The base Silver service includes content and hosting, but does not include ongoing maintenance. Gold service includes content, hosting, and adds two hours of monthly site maintenance. Platinum service includes advanced search engine optimization services, setup of separate pay-per-click (PPC) campaigns, and configuration of Google Analytics.

[www.CPASiteSolutions.com](http://www.CPASiteSolutions.com)

Read the full review and see expanded ratings for this product online at: [www.CPAPracticeAdvisor.com/11229619](http://www.CPAPracticeAdvisor.com/11229619)

## Build Your Firm Websites for Accountants

Read the full review and see expanded ratings for this product online at: [www.CPAPracticeAdvisor.com/11229546](http://www.CPAPracticeAdvisor.com/11229546)

### BEST FIRM FIT

Build Your Firm provides customized content and web design for a unique website solution designed to meet the needs of each individual firm. Practitioners with specialized or nontraditional practices should be a good fit for this solution.

### STRENGTHS

- A library of e-mail newsletter articles are provided to subscribers.
- An optional WordPress blog can be added for a small additional charge.
- The company has ten years of experience creating websites for accountants.

### POTENTIAL LIMITATIONS

- The integrated client portal application has very limited capabilities, but the service can be integrated with ShareFile for an additional fee.
- Although firms can make minor changes to their websites, most of the significant modifications must be created and uploaded by the website consultant.

### SUMMARY & PRICING

Pricing is variable based on a wide range of available services and add-ons, and starts at \$83.33 per month (\$1,000 per year), with no set up fee for a basic Premier website, and base setup fees of up to \$1,500 for customized Niche websites. Websites are offered with a 60-day free trial.

[www.BuildYourFirm.com](http://www.BuildYourFirm.com)

## AccountantsWorld - Website Relief

Read the full review and see expanded ratings for this product online at: [www.CPAPracticeAdvisor.com/11229591](http://www.CPAPracticeAdvisor.com/11229591)

### BEST FIRM FIT

Firms who use the AccountantsWorld Power Practice Suite of applications for client engagements.

### STRENGTHS

- Website Relief allows users to create a firm's website using a graphical page editing application. Users can easily include pages for social media, financial

calculators, and news feeds within the site, and advanced users can modify the HTML code for the pages.

- Users can administer e-mail accounts and forwards from within the application.
- Information for search engine optimization is accessible from within the control panel for the website.

### POTENTIAL LIMITATIONS

- Some of the vertical menu website templates look somewhat basic and dated.
- Website Relief is limited to maximum of 40 pages, which is adequate for most firms, but may be a limitation to some larger firms.
- The e-mail hosting included with the

service provides only POP e-mail access, and does not support either IMAP or Microsoft Exchange connections.

### SUMMARY AND PRICING

Website Relief is priced at \$59 per month, or \$595 per year (if paid in advance).

[www.AccountantsWorld.com](http://www.AccountantsWorld.com)

# Beyond Crunching Numbers: How Cloud Services Will Differentiate Your Firm

By Sabrina Parsons, CEO of Palo Alto Software

**B**usinesses both large and small have come to expect that financial information will be accessible at all times and that accounting firms show they're as

**tech-savvy as any other profession.** Unfortunately, a 2013 Sleeter Group survey revealed that only 15 percent of small businesses believe their accounting firm is ahead of the curve when it comes to technology use. With cloud services, it is easier than ever to meet client demands and to set yourself apart from competing firms. While many firms are understandably resistant to change, the cloud's benefits far outweigh the risks.

Many accounting firms still rely on legacy systems and siloed processes simply because they see the cloud as far too daunting and that the transition towards these services is easier said than done. While this is sometimes true, it's important to remember that there are many services capable of hosting data from QuickBooks or other accounting tools that integrate previously imported information into the services they offer. These solutions do not require a complete overhaul. But, they give CPAs the ability to stick with the data entry processes they know, while upgrading to cloud-based storage and analysis services for clients.

## Anytime access, automatic analysis

QuickBooks is the most widely used small business accounting software, and is the go-to solution for countless accountants. Generally, QuickBooks lives installed on a Windows machine, and more often than not, that machine belongs to the accountant. This limits the client's access to the QuickBooks data and puts the accountant in the position of having to manage the data and send reports to the client when requested. But, there are ways for the client to play a

larger role. With insurance, for example, customers can file claims, know what's covered and view their deductibles from an app or mobile web. Similarly, an accountant's clients want to have access to their financial information at a moment's notice. Cloud services that host QuickBooks data offer this to clients while allowing accountants to stick with what they know best.

More importantly, clients want to know what their financial numbers *mean* for their personal or business budgets. They often turn to their accountant to access the information, crunch the numbers and present the results in an easily digestible way. These can be tedious, time consuming tasks for accountants who are often managing multiple clients. Even worse, a client doesn't always see the value in the accountant's time generating the reports, as they perceive the data in QuickBooks to be "theirs." Many cloud-based services, however, will automatically import accounting data and display it in easy to understand reports - made specifically for small business owners, and not bookkeepers or accountants, like reports from accounting software.

## Shift towards advisory

As technology services that can help even the newest business owner manage his or her own financials with ease become more widespread, it's important for CPAs to assert their role to remain relevant. By offering QuickBooks integrated cloud services for clients, accountants are no longer just bookkeepers, but rather financial advisors. If clients have automatic access to the data and analysis they need, but receive high-level advice on how to act on the data from their CPA, accounting firms quickly become year-round necessities.

Not surprisingly, the Sleeter Group survey also found that SMBs look to accountants first when it comes to seeking strategic financial advice. It is advice, not number crunching or graph and chart preparation that businesses want from an outside accounting firm. But the accounting firm needs to give that advice, in conjunction with understanding and knowing the financial picture of that SMB. The survey also found that while traditional services such as audits and tax preparations were the top services business clients want from an accounting firm, business planning and strategy ranked high on the list, with 25 percent of respondents expressing a need for both services. If accountants are able to



effectively help clients engage in planning and understand the levers that will ultimately grow their businesses, they will remain relevant and valuable to their clients.

## Setting your firm apart

Businesses know what they want from accountants, and are not afraid to switch firms to get what they need. According to The Sleeter Group, about half of SMBs have switched accounting firms at some point due to lack of expected services. In a highly connected world, it's difficult for accounting firms to compete using outdated technology.

If the idea of a transition to the cloud seems like an impossible task, don't give up just yet. There are hybrid services available that allow your firm to continue using QuickBooks and other systems you're familiar with, while providing clients with access to the data and analysis they need in a cloud-based format. It's time to let technology do the busy work so CPAs can do what they're trained to do: help clients reach their personal and business financial goals. ●

*Since 2007, Sabrina Parsons has served as CEO of Palo Alto Software, a company that creates business planning and tracking technology for small businesses. She and her husband, Noah, founded a UK software distribution company in 2001 that was acquired by Palo Alto Software in 2002. As CEO, Sabrina is a staunch supporter of entrepreneurs and often mentors her small business customers on effective financial planning techniques.*

## Increased Import Options Enhance Intuit Tax Online

By Taija Jenkins, Associate Editor

For thousands of accountants and their clients, tax season just became a lot more harmonized. Users of Intuit Tax Online can expect major enhancements to the tax preparation solution for Tax Year 2013. Earlier this year, Intuit introduced a new design for all of its products. The enhancement has been nicknamed Harmony because it creates the same look and feel among all Intuit products, creating a harmonized workflow and experience for the company's customers.

While ITO now boasts a new user interface, users will notice that the harmony doesn't just stop there. Other enhancements include an expanded view of client data, support for not-for-profit organizations, faster performance and improved integration with QuickBooks Online. ITO 2013 provides users with a holistic view of their tax returns, retaining every return prepared or imported into the system. Intuit has also worked to drastically shorten the amount of time pages take to load.

"Our customers will be pleased with the new features we have introduced in Intuit Tax Online 2013. These enhancements are part of our continued pursuit of efficiency and timeliness. We continue to strive for simplicity and making our products easy to use so that our customers and their clients can spend more time working on their business," said Jorge Olavarrieta, Group Product Manager, Intuit Tax Online.

One major feature that users will notice in ITO 2013 is the ability to integrate directly with QBO. This feature was introduced in beta last year and will be fully incorporated in this year's solution. With the integration, users can use the data

from QuickBooks Online to automatically prepare tax returns in Intuit Tax Online.

In line with its Open Platform Strategy, Intuit has continued to add import capabilities to Intuit Tax Online. Many of the new features are designed to integrate the tax preparation software with the rest of the Intuit ecosystem, allowing accountants to access all of their client's data from a central location. Since the client data is attached to Intuit's Single Sign-On feature, data is automatically available once users log into the solution. With Intuit's Virtual Office, users have instant access to any file created with an Intuit product.

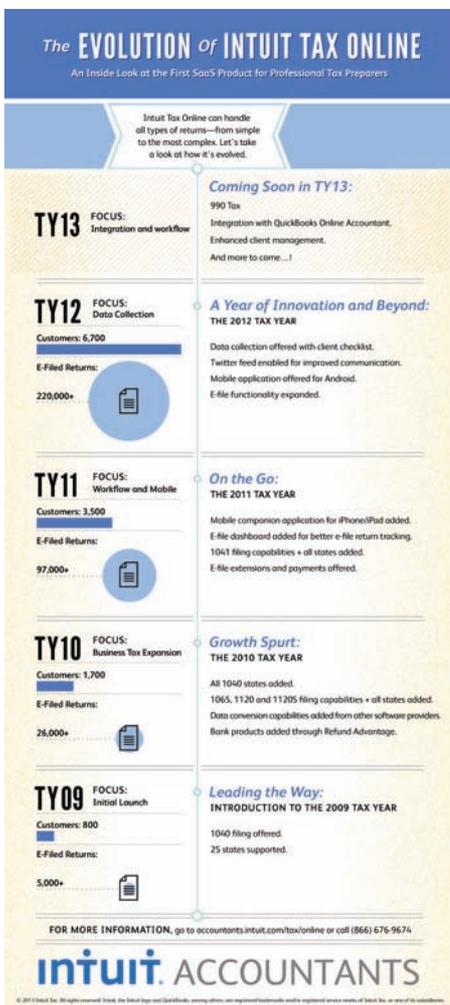
Intuit Tax Online now fully supports electronic filing for six modules, adding support for not-for-profit organizations. In addition, there are no license, startup or e-file fees. Users can prepare returns for free, paying only when they file. The solution supports all major forms, as well as state and federal e-filing. The system also supports electronic filing for extensions, payments and amended returns.

The latest enhancements to Intuit Tax Online are a part of the

company's vision to continue to grow the product. The number of users has doubled each year for the past four years, and that rate is expected to increase as the company continues to embrace mobile technology and the advantages for its customers. With the Intuit Tax Online companion mobile app, users can access client information directly from their mobile device. Users can also view clients' up-to-date e-file status and email tax return information.

"QuickBooks Online integration and data accessibility within the Intuit ecosystem are just two examples of our commitment to making things simpler and easier for our customers. As we continue to enhance Intuit Tax Online, it will no longer be a standalone tax product, but will become part of a suite of products designed to maximize efficiency and productivity," said Olavarrieta. "We have also invested heavily in the mobile companion app for Intuit Tax Online and our customers can expect lots of exciting things to come."

The latest version of Intuit Tax Online was released November 13, 2013. ●



Taija Jenkins is an associate editor for CPA Practice Advisor.

# Creating a Different Kind of Firm

Kristy Short, Ed.D

**F**rom its start in 1989, the firm of Mantyla McReynolds wanted to run a ‘different kind of firm.’

“The partners are always tuned in to the firm’s culture and are dedicated to making Mantyla McReynolds a great place to work,” explained Shane Grant, CPA and partner. “We stay involved with our staff and make sure we are doing what we should to maintain a positive, productive work place.”

With a firm of this size (40), it can be difficult to maintain good morale. According to Grant, however, the partners do a pretty good job.

“We understand that people have a life outside of work, so we strive to create a flexible work environment... we encourage staff to go to their kids’ games and try to limit the work week to manageable hours.”

The firm is also dedicated to putting out top quality product for clients, and that includes ensuring a rich service experience every time. “Of course, we make sure that every tax return and financial statement we produce is of the highest quality, but the bigger goal is to partner with our clients and provide sound advice and guidance all year.”

Overall, firm partners are “in it”—that is, integrated into the culture of the firm to maintain a closeness with staff and clients.

Grant explained that this is a key factor in the firm’s long-term success. “It can be easy for partners to get separated from the day-to-day. Staying involved provides the insight required to preserve a positive work environment and maintain satisfied clients.”

## Putting Staff First

It’s always nice to hear stories about companies that appreciate their employees and work to ensure staff loyalty. Mantyla McReynolds is one of those businesses.

“We understand the value of having an outstanding staff of qualified, client-focused individuals,” Grant explained. “There’s still a shortage of experienced accounting professionals, so when you have great employees, you want to keep them.”

Grant explained that first and foremost, the partners are dedicated to creating a flexible, personal-life-friendly workplace.

“During busy season we try to limit the number of hours our staff puts in per week. We understand that the work needs to get done, but we also understand the value of not burning out our employees. Throughout the year we also make it clear that it’s okay to leave during the day to attend kids’ sporting or other events. Employees know that they can come back later to finish up work if needed.”

Beyond a flexible work environment, partners also try and create an



atmosphere of fun. “We throw a Halloween and holiday party every year for staff. We also keep the office stocked with snacks, both healthy [fruit] and unhealthy [candy]. Food can be a great pacifier during the chaos of tax season,” joked Grant.

Led by tech-savvy leaders, the firm is hyper-alert to maintaining a highly efficient office. “You have to keep up with technology to keep staff happy as well. We make sure our employees have the tools required to work productively.”

For example, the firm rotates out computers every three years and all workstations have three monitors. Partners also maintain best-in-class applications to support paper-free, streamlined workflows.

“We run a paperless office. Our staff have access to an integrated high tech system that supports end-to-end digital workflows,” Grant stated. “This eliminates slow and tedious manual data entry tasks.”

## Communication...The Key to Strong Client Relationships

The success of Mantyla McReynolds hinges on client relationships, which is why partners and staff go the extra mile to guarantee a rich experience for their clients—every time.

“Communication is the key,” explained Grant. “We serve as our clients trusted advisor, which means we are talking to them all year long... not just at tax time. You can’t expect to maintain clients long-term if you don’t stay in touch and keep them informed.” At the heart of the firm’s business model is to serve as the clients’ partner—that is, offer ongoing support and coaching to ensure that clients stay on a healthy financial path.

“We help our clients from start to finish. That means being there from the beginning, coaching them on entity selection, tax strategy, and business planning. That also means maintaining the relationship all the way through to succession,” said Grant.

A core service provided by the firm is valuation. To secure the role as trusted business advisor, the firm implemented a service called Valuepath plus (Valuepath), offered by BV BackOffice. Valuepath is a valuation package that offers an initial detailed business valuation and also provides ongoing support to guide clients in building business value over time.

“The Valuepath service keeps us close to clients as we help them understand the drivers of value in their businesses and what needs to be

## STATS AT A GLANCE

Firm launch: 1989

Total employees: 40 F/T

Home base: Salt Lake City, UT

Firm description: Full-service accounting, audit, and business advisory firm

Technology of Choice: BV Back Office (Valuepath plus), Thomson Reuters, BDO Seidman proprietary audit software



From left to right: Matt McReynolds, Ken Oveson, Shane Grant, Kim McReynolds, Don Mantyla, Brian Cheney and Jim Oveson.

done to continue to drive value up over time. Our goal is to ensure that clients can sell their businesses for top market value when it's time for succession." Valuepath is an offering that keeps staff in regular communication with clients.

Mantyla McReynolds is also a big audit firm, which demands ongoing, open communication. "Audits are complex, so we make sure that our clients are always up to date on activity."

### The Big Picture

The importance of maintaining a

healthy firm culture can not be overstated. A good culture creates a state of content and satisfaction among staff and clients. A negative culture, on the other hand, perpetuates low morale and lack of staff engagement—creating a ripple effect that will most certainly negatively affect clients.

"Firm culture is always on the radar," said Grant. "We never want our staff or clients to be anything less than satisfied."

From a flexible work environment to dedicated advisory-based client services, Mantyla McReynolds is a

firm that has figured 'it' out. Keeping a happy balance among staff means clients are better served. And combined, this all equates to long-term loyalty. It's a winning formula that other firms may wish to adopt. ●

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



Kristy is a partner in RootWorks Communications ([RootWorks.com](http://RootWorks.com)) and president of SAS Communications 360 ([SAScommunications360.com](http://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](mailto:kristy.short@cpapracticeadvisor.com).



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# Why Your Firm Should Consider a Cloud Ecosystem

Over the last five years, one of the most common arguments I hear about moving to the cloud involves data integration. I'm often asked, "Why would I want to give up my tightly integrated suite of on-premise software to move to a bunch of disparate cloud systems?"

The answer is the cloud ecosystems that are developing before our eyes. In the cloud model, integration and data flow becomes much easier through web services. Most of the cloud providers are using web 2.0 technologies to build their platforms which provides for better search, reporting and collaboration capabilities. And better integration.



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.

## What is a Cloud Ecosystem?

When a Software as a Service (SaaS) vendor becomes a major player in the market or the leading solution for a given problem, they attract an ecosystem. This ecosystem is a set of partners (often referred to as add-ons) that work directly with the SaaS vendor to fill functionality gaps and increase the value of both. In layman's terms it is about the sum of the parts exceeding the value of each on its own. And when all the gaps in the ecosystem are filled, users are now able to have the best of both worlds – an integrated suite made up of best-of-breed solutions.

An example of this is the ecosystems rapidly developing around many of the leading cloud accounting solutions such as Intacct, Intuit and Xero. While these SaaS vendors focus on their core competencies of accounting and integrated payroll solutions, they are attracting an army of third-party cloud service providers that are filling gaps like reporting tools, dashboards, work papers, workflow, project management and CRM. Combined, the ecosystem covers the majority of a firm's software needs. And any holes that remain will likely be filled by a partner joining the ecosystem in the near future.

## Open vs. Closed Architecture

This is a new chapter in a long standing battle between open and closed architectures. The infamous battle between Apple and Microsoft over the



operating system and office productivity software is a perfect example. Microsoft ultimately won out with an open approach and history would support that most of the time, the open model will prevail over the closed. The underlying force behind this is that consumers prefer choices.

I believe an open architecture is critical to the success of providers in the rapidly evolving cloud world as well. Those cloud providers that accept they can't be all things to all people will adopt an open, collaborative approach and will win. Those who hold on to a closed, proprietary model will likely get left behind as they frantically try to hold on to the market share of their legacy, on-premise software.

## A New Phenomenon?

With the recent growth in popularity of using the ecosystem buzzword in the context of the cloud, one would think this is a new phenomenon. In reality, companies have been building ecosystems by encouraging independent software vendors to build their solutions on top of their enabling software. Microsoft, IBM and HP have done this for years in order to build success in the market. The major difference with

cloud ecosystems is that these independent partners are a critical component of the business model.

Another recent example is what the mobile operating systems have done in building out application ecosystems. Apple, Google, Blackberry and Microsoft have all been luring independent developers to build their apps on top of their platform in an effort to become the most valuable mobile ecosystem. As with cloud ecosystems, mobile operating systems depend on their developers as part of their business models.

## Make Ecosystems Part of Your Decision

Next time you find yourself evaluating a cloud solution, ask yourself if the service is part of a larger ecosystem. You have to evaluate the whole group of solutions rather than analyzing a single solution in isolation. Don't rule out an option simply because it's missing a key feature. That feature might be covered by another third-party tool that is tightly integrated with the cloud offering in question. As cloud ecosystems continue to grow, so will our dependency on them in the software evaluation process. ●



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