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CPA Practice Advisor

EDITION

Today's Technology for Tomorrow's Firm

10th ANNUAL

Who's? Who

AMONG THOSE
SERVING THE TAX
& ACCOUNTING
PROFESSION

BRIDGING THE GAP
**5 Tips for Using
Technology as a
Strategic Asset**

6 Tips for Managing
Underperforming Staff

Accountants at Work
(and Play) Post-April 15

**How Mattingly
Zsebe, PA is
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PRODUCT REVIEWS:

- Professional Tax Compliance Systems
- Practice Management Systems



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23



4



14

CONTENTS

COVER STORY

- 14 Great Practices:** A Journey of Understanding – How One Firm is Reaping the Benefits of Marketing
By Kristy Short, Ed.D



COLUMNS

- 4 My Perspective:** Thank You for an Amazing Journey
By M. Darren Root, CPA.CITP, Executive Editor



- 12 From the Trenches:** Save It or Lose It - Don't Let Your Firm's Data be at Risk
By Randy Johnston



- 16 The ProAdvisor Spotlight:** Apps.com Extends Its Global Reach
By Taija Jenkins, Assistant Editor



- 36 By The Numbers:** The Costs of Distracted Driving
By Jeff Davidson, The Work-Life Balance Expert



- 38 Successful Small Business Consulting:** What SMBs Want from Their Accountant – Have You Asked?
By Doug Sleeter



- 42 Bridging the Gap:** 5 Tips for Using Technology as a Strategic Asset
By Jim Boomer, CPA.CITP



FEATURES

- 22 Accountants at Work (and Play) Post-April 15**
By Gail Perry, CPA, Editor-in-Chief



- 23 Who's Who? Technology is Your Firm's Strategic Partner**
By Isaac M. O'Bannon, Managing Editor



- 40 6 Tips for Managing Underperforming Staff**
By Sandra Wiley



2014 PRODUCT REVIEWS

- 6 How to Find the Right Tax System for Your Firm:** 2014 Review of Professional Tax Compliance Systems
By Steven Phelan, CPA

- 18 2014 Review of Practice Management Systems for Accounting Firms**
By Brian Tankersley, CPA.CITP, Technology Editor



WEB EXCLUSIVES

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22



Thank You for an Amazing Journey

Five years ago I embarked on an extraordinary journey by joining the editorial team of this magazine, known then as *CPA Technology Advisor*. Today, I share with you my final column as its executive editor.

As many of you know, in addition to managing my own practice and providing editorial leadership here, I am also the CEO of RootWorks, which provides the tools and resources that accounting firms need

to implement many of the concepts and solutions shared in *CPA Practice Advisor*. With RootWorks membership at almost 500 firms and continuing to grow, the company requires much of my time and attention, which has led me to the difficult decision to resign my tenure at this publication.

When I reflect on the evolution of *CPA Practice Advisor* over the five years since I began this journey, it is with gratitude and appreciation for how this publication serves our profession. It has been an honor to help shape the magazine which serves as a leading technology and practice management resource for accounting leaders and entrepreneurs.

As regular readers know, the past five years have brought some significant changes to *CPA Practice Advisor* with the objective of better serving our readers and reflecting the rapid pace of change in our industry. Physically, we reduced the size of the print publication and expanded digital content as the online environment grew exponentially. In 2011, *CPA Technology Advisor* was rebranded to *CPA Practice Advisor* to communicate the magazine's renewed focus on helping accountants adapt to the dynamic changes occurring in the market and the impact of technology on our profession.

For the past several years, the editorial content of the magazine has expanded from providing merely tactical information such as software reviews and technical tips, to illustrating how the solutions that are available can be leveraged to achieve advanced levels of efficiency and productivity to transform firms and change the way that accounting professionals do business. This has been a key shift in mindset and focus

that continues to benefit our profession as we move from looking at technology implementation as the end goal, to seeing it as the means to not only optimizing our practices, but also to achieving a more balanced working life.

It is my hope that the time I have spent at *CPA Practice Advisor* has created value for you as a reader. My goal has been to help our profession better understand the role that technology can play as not only a driver of productivity and efficiency but of professional freedom—the freedom to work when and where you want to, while also delivering enhanced service to your clients.

In closing, I extend my sincere thanks to Cygnus Business Media for the opportunity to be part of *CPA Practice Advisor* and to the entire editorial team which includes many dedicated individuals who go above and beyond to ensure that readers have access to the most comprehensive resources and the latest news both in print and online. As an accounting professional, I am looking forward to *CPA Practice Advisor's* next five years as the magazine and its online platform continue to evolve, providing education and leadership to our profession.

Thank you for an amazing journey,
- Darren

The entire team at CPA Practice Advisor thanks Darren for his years of service to the magazine. Darren helped build a strong foundation for the future of our magazine and has pointed us in the direction in which we will continue to grow, providing insights and ideas and the latest concepts to our loyal readers. As we move forward with leadership from our new editor-in-chief, Gail Perry, we are excited about our future and also wish nothing but the best to Darren as he devotes more time to RootWorks and Root & Associates. We're certain our paths will continue to cross and look forward to that as well. — Jim Baker, Publisher



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

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BASIC SYSTEM FUNCTION

- Installation Ease
- General Navigation & Ease of Use
- Industry-Specific Templates
- Industry-Specific Features
- Platform Support

CORE ACCOUNTING CAPABILITIES

- GL/AP/AR Functionality
- Sales Tax Functionality
- Payroll Functionality
- Audit Trail
- Multi-Currency
- Multiple Language Support
- Multi-Location Support
- Multiple Users

DAY-TO-DAY OPERATIONS

- Sales/Point of Sale/Shipping
- Customer/Vendor Employee Management
- Inventory/Purchasing
- e-Features
- Remote Access

MANAGEMENT FEATURES

- Dashboard Overviews
- Reporting
- Security Features
- Integration/Import/Export
- Data Transfer
- External Integration
- Online Accountant Transfer Tool

HELP/SUPPORT

- Built-in Support Features
- System Updates
- Support Website/Documentation
- U.S.-Based Support

How to Find the Right Tax System for Your Firm

2014 Review of Professional Tax Compliance Systems

Tax preparation remains a major source of revenue for many accounting firms. Although seasonal income for many, a lot of consideration should still be given for the most appropriate tax software solution. Each firm has a different number of employees, client focus and a host of other differences to consider. Thankfully there are plenty of tax software solutions to choose from to fit individual firm needs.

For the second year in a row, tax practitioners had a slight delay in starting the current year tax season. Due to the 16-day federal government closure in October 2013, update processes to the IRS systems were delayed. Though the time delay was not significant, it still resulted in a time compression for an already stressful time.

Tax preparation remains a major source of revenue for many accounting firms. Although seasonal income for many, a lot of consideration should still be given for the most appropriate tax software solution. Each firm has a different number of employees, client focus and a host of other differences to consider. Thankfully there are plenty of tax software solutions to choose from to fit individual firm needs.

As in the past, we have split our reviews into two sections – advanced workflow and traditional workflow. Though the general functions pro-

vided by all the vendors are similar, there are certain features and capabilities that are reserved for larger firms or those that specialize in certain types of engagements such as international or multi-tiered partnerships. This year, we reviewed ten solutions with five solutions each dedicated to the advanced and traditional workflow models.

The advanced workflow solutions are designed for larger firms and are especially geared to firms requiring at least one review level. The advanced workflow solutions are generally more capable at handling complex tax scenarios and provide a greater assortment of tax form support. In

compliance. State and local tax form support continues to be a differentiator between solutions.

New for this year, many vendors have focused resources on improving income-splitting to accurately produce separate state returns to meet filing requirements under DOMA. Some other changes in many systems focused on the implementation of the Affordable Care Act.

Navigation in most systems remains intuitive, with many vendors focusing on consistency with the underlying data input worksheets. Many vendors, especially in the advanced workflow solutions, are reengineering data sheets between

REVIEWS OF ADVANCED WORKFLOW SYSTEMS

PAGES 7 AND 8

REVIEWS OF TRADITIONAL WORKFLOW SYSTEMS

PAGES 10 AND 11

contrast, the traditional workflow solutions are typically geared to firms processing a large number of individual returns. Traditional workflow solutions focus on the usability of the software and present many customer service features, such as a refund/tax balance due and client contact information in prominent view.

Overall, not too much has changed in the feature sets as most solutions are generally considered mature products now. Most solutions are capable of handling nearly any tax situation and include full federal support for individual, business, non-profit and other major category tax

entity types to provide users a more consistent screen appearance and to curb some of the time necessary to learn these systems.

Update processes are generally automatic for desktop users and should not cause too much disruption in the daily workflow. Online vendors are pushing updates in the background and generally require no user intervention. Many vendors are also making efforts in the current releases to prominently display all IRS system notifications, and any system or form updates upon entering the software.

One area that has seen continued



Steven M. Phelan, CPA

Steven is currently a tax manager at North Bay Associates, a family group office based in Oklahoma City, Oklahoma. He also owns a small tax and accounting practice as a side business. Prior to this, he spent 12 years in public accounting practice, with a primary focus on tax and technology consulting. He is active within the CPA profession and is a frequent speaker at various seminars and conferences throughout Oklahoma.

PROFESSIONAL TAX PREPARATION SYSTEMS

improvement over the prior year releases is the wide-spread implantation of the Modernized e-File (MeF) platform. All products reviewed support the MeF platform for most business returns. Many vendors have worked diligently to bring this functionality to the individual platform as well. Doing so provides a number of features to tax practitioners. A substantial feature is the ability to electronically file tax returns year-round, even after deadlines have past. The MeF platform does not currently support electronic filing of

amended returns, however.

Most vendors have developed self-help platforms that offer simple solutions to common problems. While most vendors still maintain a frequently asked questions page or an up-to-date knowledge base, many have started creating video help. These short videos are perfect for those new to the software, either as a new hire or through software conversions. Many vendors are also integrating chat functions into their software, so practitioners can potentially solve issues while still

processing returns and may avoid long phone support wait times.

This year the advanced and traditional workflow solutions each contained two true cloud-based tax solutions. Many of the traditional desktop solutions are starting to increase efforts to be accessed through remote Software-as-a-Service (SaaS) solutions as well. All of these efforts reflect the slow but growing demand for tax practitioners to process returns through multiple access points. ●

Thomson Reuters GoSystem Tax RS

Read the full review and see expanded ratings for this product online at: www.CPAPracticeAdvisor.com/11359545



BEST FIRM FIT

Larger accounting practices or firms focusing specifically on high net worth individuals

STRENGTHS

- Capabilities provided to process returns when offline
- Support for nearly every tax situation and return type
- Multi-user simultaneous access
- Excel Add-In tool doubles as

direct data import and work-paper

POTENTIAL WEAKNESSES

- Interface may be difficult for new users, although efforts are currently underway to mitigate this

SUMMARY & PRICING

GoSystem Tax RS is an Internet-based solution that offers a secure environment that can be scaled

according to your business needs. GoSystem Tax RS is primarily designed for firms focusing on high net worth individuals, returns with a high degree of complexity and multi-tiered consolidations, but can also handle simple returns with a high level of speed and accuracy. Pricing for GoSystem Tax RS is primarily dependent upon the number of users and client returns to process. A starter

pack is offered for \$4,000 and includes the ability for up to 4 users to fully process and file up to 20 returns.

www.thomsonreuters.com

CCH Access Tax

Read the full review and see expanded ratings for this product online at: www.CPAPracticeAdvisor.com/11359575



BEST FIT

Firms with multiple offices looking to streamline access for employees and firms that require worker mobility

STRENGTHS

- Integration with MS Word for letter generation
- Multiple access options via desktop and mobile devices
- Integration platform available to

bridge in third-party applications and data

POTENTIAL LIMITATIONS

- Without Internet connection the product will not properly function

SUMMARY & PRICING

CCH Access Tax is a cloud-based tax preparation, compliance and firm management solution. Built on

the latest .NET technology, CCH Access Tax is part of a cloud suite offering, but still maintains integration points from traditional desktop solutions. The product is fully scalable to meet the needs of firms of any size and client specialization. Pricing is based on the number of client returns processed and may be purchased on a per-return basis or through a number of predetermined packages. Unlimited client

processing for the individual Federal modules is priced at \$1,575 and unlimited state modules pricing starts at \$550. Discounts may also apply depending on the volume of returns processed and other modules simultaneously purchased.

www.cchgroup.com

Intuit Lacerte Tax

Read the full review and see expanded ratings for this product online at: www.CPAPracticeAdvisor.com/11359521



BEST FIT

Accounting firms servicing clients with a wide array of complexity and firms currently relying on QuickBooks for client recordkeeping

STRENGTHS

- Maintains a peer-to-peer network for program and situation assistance
- Interface allowing direct access to return, diagnostics and print

options

- Strong integration with QuickBooks

POTENTIAL LIMITATIONS

- Review capabilities not as complete as competitors
- Few remote access capabilities without significant IT support or monthly fees

SUMMARY & PRICING

Lacerte Tax is the most comprehensive tax software solution offered by Intuit. Lacerte Tax is designed for accounting firms servicing clients with a wide array of needs and complexity. Several key features were added over the past year as a direct result of customer feedback. Lacerte Tax is typically priced through unlimited return modules, but returns may still be purchased individually. Unlimited processing

for individuals, including federal, one state and electronic filing is currently listed just under \$5,000. Other modules are available through a la carte pricing and pricing will vary depending on complexity of the module.

www.intuit.com

CCH ProSystem fx Tax



BEST FIT

Firms with one location desiring a comprehensive in-house solution to handle complex returns

STRENGTHS

- Multiple integration points
- Ability to calculate complex returns
- Newly released CCH eSign

POTENTIAL LIMITATIONS

- Few online integration options

SUMMARY & PRICING

ProSystem fx Tax is the traditional network and client installation solution offered through CCH. With the ability to calculate complex returns and wide range of supported forms, ProSystem fx is a

Read the full review and see expanded ratings for this product online at: www.CPAPracticeAdvisor.com/11359534

solution for firms of all sizes. Pricing for ProSystem fx Tax is largely based on the number of client returns processed. An unlimited Federal individual module is available at \$1,575 with unlimited state modules starting at \$550 each. Returns may also be purchased individually under a per-return-pricing model. Pricing

may be eligible for discounts depending on number of modules purchased, user needs and total returns processed.

www.cchgroup.com

Thomson Reuters UltraTax CS



BEST FIRM FIT

Accounting firms and practitioners focusing on a variety of client complexity returns and firms currently relying on other solutions in the CS Professional Suite

STRENGTHS

- Multiple options to access software, both online and Internet-based

- Up to 4 monitors displaying unique views
- Multiple office location options

POTENTIAL WEAKNESSES

- Mobile device access is currently limited to certain platforms

SUMMARY & PRICING

UltraTax CS provides accountants a comprehensive option for profes-

Read the full review and see expanded ratings for this product online at: www.CPAPracticeAdvisor.com/11359562

sional tax software and includes a wide array of integrated technology to help boost tax preparation efficiency. UltraTax CS is scalable to fit needs of firms of all sizes, but recent efforts by Thomson Reuters have shifted efforts towards client complexity. Many of the enhancements made over the past year and scheduled for current year release are geared to assist practitioners

with more complicated tax client structures. Pricing for UltraTax CS is offered through an array of options, but unlimited federal 1040 processing for one user starts at \$2,660. Unlimited state, business and electronic filing options as well as per-return-pricing are also available.

www.thomsonreuters.com

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Thomson Reuters - Agile Tax

2014
OVERALL
RATING

4

BEST FIT

Sole practitioners and small firms with a focus on high volume tax production

STRENGTHS

- Simple interface and pricing structure
- Online document storage included
- Easy scalability for seasonal workers

POTENTIAL LIMITATIONS

- Only integration point is Excel
- Mobile options are limited due to use of Silverlight

SUMMARY & PRICING

Agile Tax is an Internet-based tax solution intended as a standalone product for high volume tax professionals. Through the cloud, professionals can maintain the portability that is rapidly becoming com-

Read the full review and see expanded ratings for this product online at:
www.CPAPracticeAdvisor.com/11380258

monplace. With a simple interface and pricing structure, sole practitioners and small firms are offered a flexible tax preparation solution. Pricing starts at \$100 per month for unlimited 1040 processing and includes all federal, state, e-filing and firm document storage for 1 preparer. Additional preparers may be added at \$50 per month with no minimum term commitments. Client portals may be activated at

\$10 per month for 100 client portals. Per-return pricing is also available.

www.thomsonreuters.com

Intuit Tax Online

2014
OVERALL
RATING

3.75

BEST FIT

Sole-practitioners and small firms looking for fixed product pricing and the ability to process simple returns through an anytime, anywhere platform

STRENGTHS

- Multiple options to access solution, desktop and mobile
- Can process and review return without payment, but cannot print or file

- No limit to the number of users inside the firm

POTENTIAL LIMITATIONS

- Integration points are currently limited
- No available onscreen help
- No available data trail to determine source of numbers on returns
- Printing the return is currently all or none, but an update is coming to remedy this

SUMMARY & PRICING

Intuit Tax Online is intended for sole-practitioners, but is scalable to small local firms with up to around 10 employees. Intuit Tax Online is a good fit for sole-practitioners and small firms looking for an all-inclusive pricing model and true anytime, anywhere access. Pricing is structured in bundles of returns and 50 1040 returns may be processed for \$499, which includes all federal and

state compliance filings as well as electronic filing fees. Returns may be purchased individually as well. Additional detailed pricing for business returns and all bundles is listed on the Intuit Tax Online product webpage.

www.intuit.com

CCH Small Firm Services - TaxWise

2014
OVERALL
RATING

4

BEST FIT

Sole-practitioners with a focus on mostly simple return types and those servicing the Hispanic market

STRENGTHS

- Simple data entry, often lending to heads down entry

- Multi-language tax form options
- Common database storing all employer identification numbers

POTENTIAL LIMITATIONS

- Review tools are incomplete

Read the full review and see expanded ratings for this product online at:
www.CPAPracticeAdvisor.com/11380218

SUMMARY & PRICING

TaxWise is a tax offering provided by CCH Small Firm Services. TaxWise provides a full line of tax software with a concentration on simple user interface and data entry. A full-service TaxWise package including all returns types and

CCH US Master Tax Guide research is currently priced at \$2,349. A full list of pricing options is available on the TaxWise product information website.

www.cchsf.com

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* All listing information (Online Buyer's Guide) must be updated for the 2014 Accountant's Product & Services Guide.

PROFESSIONAL TAX PREPARATION SYSTEMS

Intuit ProSeries Tax

2014
OVERALL
RATING

4.5

BEST FIT

Small to medium-sized practices and sole practitioners who focus primarily on tax and have low to medium complex returns

STRENGTHS

- Simple interface allowing data entry directly on tax forms
- Integration points with QuickBooks and TurboTax

- Direct scan data import option, though at a separate charge

POTENTIAL LIMITATIONS

- Very few review tools in place
- No easy remote access option provided

SUMMARY & PRICING

ProSeries Tax is the mid-range tax solution offered by Intuit designed for the sole-practitioner

Read the full review and see expanded ratings for this product online at: www.CPAPracticeAdvisor.com/11360171

and small accounting firm. ProSeries Tax has a simple interface and strong reliance on worksheets for all data entry. A wide range of pricing options are offered with many focusing on bundles of returns but also include per-return pricing and full-service unlimited processing options. Tax professionals with a high volume tax practice requiring unlimited processing of business

and individual returns along with associated electronic filing can purchase the PowerTax Library bundle for under \$5,500. A variety of other pricing scenarios are prominently displayed on the ProSeries Tax information website.

www.intuit.com

CCH Small Firm Services - ATX

2014
OVERALL
RATING

3.75

BEST FIT

Sole-practitioners and firms with three or fewer staff

STRENGTHS

- Simple interface and data input screens
- Online tax research options included in many pricing options
- Strong suite integration points

POTENTIAL LIMITATIONS

- No remote access solution currently available
- Review tools are incomplete

SUMMARY & PRICING

ATX provides tax professionals a combination of quality and value. ATX was designed by tax and accounting professionals to be a

Read the full review and see expanded ratings for this product online at: www.CPAPracticeAdvisor.com/11360251

capable yet easy to use solution. Multiple pricing bundles are provided to help maximize value. Pricing for Total Tax & Accounting package, which includes all tax, accounting, payroll and document management solutions, is currently set at \$2,749. Users requiring only a full-featured tax solution, can purchase the ATX Max package for

\$1,249. A full list of pricing options is available on the ATX product information website.

www.cchsf.com

Bloomberg BNA 706 Preparer & 709 Preparer Offer Specialty Tax Tools

Bloomberg BNA is typically relied on to provide high levels of tax, regulatory and compliance expertise. Used by thousands of tax professionals, including the IRS, Bloomberg BNA provides a number of solutions for tax, accounting, financial planning and estate planning.

Bloomberg BNA offers two tax preparation solutions, BNA 706 Preparer and BNA 709 Preparer, which greatly differ from the traditional and advanced workflow solutions reviewed this year. The BNA 706 and 709 Preparer systems, respectively, are the most comprehensive solutions to process estate and gifts tax returns. Each system includes a built-in spell checker that users may fully customize as needed. Both systems also provide a variety of help, both program and line-by-line instructions and rich diagnostic tools.

BNA 706 Preparer

BNA 706 Preparer is designed to file estate returns quickly and efficiently. Exclusive to BNA 706 Preparer, is the ability to process two years of calculations. This feature allows preparers to finalize Form 706 for the current year and start work on any returns before the next form release.

All IRS forms required to process the estate return are fully supported. Supplemental schedules for disclosures and elections as well as an asset inventory list are automatically generated based on information already entered into the return.

Assets and beneficiary information are only required to be entered once and are carried throughout the return and any supplemental information automatically.

A full range of calculations is pro-

vided within the program including minimum marital bequest, Generation-Skipping Tax (GST), zero federal tax situations and a variety of others. Also provided are calculations for state estate inheritance taxes for all states and Washington DC. BNA 706 Preparer is currently priced under \$800 for an initial single-user license.

BNA 709 preparer

BNA 709 Preparer is specifically engineered to process gift tax returns in a simple and time-saving manner. A full range of forms and schedules are supported to automate preparation of Form 709. Data from the prior year returns is easily transferred to the current year to use as a starting point and mitigates unnecessary data entry.

Data input worksheets are easy to navigate and gift and beneficiary

information only needs to be entered once. All data and calculations automatically post to the appropriate form and schedule. Diagnostics are provided to assist with possible missing data with each diagnostic directing users to the data input worksheet or form to remedy the problem.

Calculations for current and prior year gifts are done automatically. Support is also provided for split gifts, marital deduction, Qualified Terminable Interest Property trusts (QTIPs) and generation-skipping transfers. Fully customized transmittal letters and attachments may be generated within the return. BNA 709 Preparer is currently priced around \$500 for an initial single-user license.

Save It or Lose It - Don't Let Your Firm's Data be at Risk

It is impossible to think too much about protecting your data. If you are the business owner responsible for Information Technology or an IT professional, protecting data has to always be top of mind. Backup and recovery is not an area you can leave to chance. The January installment of this column spoke about alternative approaches and pitfalls of backup and recovery. The options are worthy of review if you are interested in backup and business continuity.

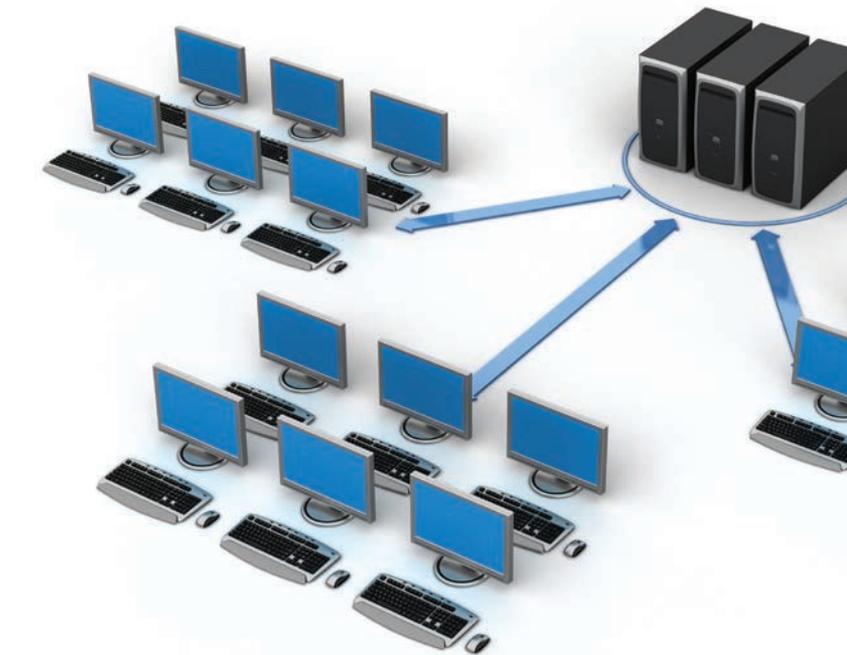
Data backup and recovery are integral to the security of your firm. Saving the right amount of data for the right amount of time and being able to recover the data in a timely fashion is important risk mitigation

for a firm. We'd like your firm to recover from hardware failures in two hours or less and from catastrophic incidents, like a fire, in less than 72 hours. We also don't want data saved beyond your normal retention policies.

One way to think about backup is to consider what you are willing to lose entirely and how long you are willing to be unable to operate. We can't cover everything needed in a single column, but consider how long you can work without computing or your data. There are a myriad of solutions promoted: web based backup, backup appliances, running in cloud data centers, and more. The size of your organization often dictates your appetite for risk. What is your current position? What is your risk appetite?

Restore Time!

Think about your organization's need to be able to operate. How much does it cost you per hour when your computer systems are not working? Run your own numbers, but consider the weighted cost



per hour of your team members. Usually, calculations are done per hour. For our purposes, ten employees will be used since it is easy to multiply or divide for larger or smaller numbers. If your labor cost is \$35/hour and benefits are about one third the hourly cost, then the hourly cost of down-time is approximately $\$50/\text{hour} \times 10 = \$500/\text{hour}$ for every ten employees. One day of down time would cost the organization $\$500 \times 8$ or \$4,000. If you believe your cost per hour per employee is different, substitute your real numbers into our illustration. However, when considering the cost of downtime you should always have in the back of your mind the hourly cost to the organization for down time.

Quick recovery, or a short restore time objective (RTO) minimizes downtime costs. Minimizing data loss or a short restore point objective (RPO) keeps work from having to be redone. A key advantage to backup appliances is the ability to copy data on a routine basis, typically every 15 minutes, and still have the ability to be substituted for the production hardware to run your application with a current copy of the data. You can read more about backup appliances at www.nmgi.com/netrescue/technology.html or speak directly to a business continuity professional. You do not have this ability with a web based

backup or a cloud based service. If you have a local hardware failure, it could take hours or days to copy your data back to local hardware. If you are running in a pure cloud service, you are at that provider's mercy to execute their own recovery process and to put you back in service. Cloud providers may have very skillful IT people, but may not be able to control a data center level outage caused by environmental factors beyond their control.

If you are a single location firm, your owners and their homes are probably in the same geography. Historically, you probably took tapes home or to a bank vault on a regular basis. You later switched to hard drives, which were probably not encrypted, and carried a few of these home to have a copy of your data "just in case." All of these off-site methods simply provide a copy of your data that can be restored to computers for use. The applications themselves are rarely backed up in this scenario, and if the applications are backed up, they can't easily be restored to dissimilar hardware. Recovery times should be expected to be 72 hours or more.

If you are a multi-location firm with offices in different geographies, you can use two backup appliances to maintain a copy of all of your data and applications. Likewise, you could create a much



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a separation of at least 70 miles between sites. Further consideration should be given to be in a different power grid (east/west/Texas) and locating your backup out of the geography when practical.

Cloud vendors guarantee their performance through Service Level Agreements (SLAs) which include the amount of allowable down time. Unfortunately, there are rarely provisions for extended outages other than refunds or waiving service fees. Few data centers are fully redundant (hot or active/active) because of the complexity and expense. Many providers try to portray that they have multiple data centers, but won't disclose how they operate. Few publish the expected time of recovery in the event of a major outage. All of the major accounting profession providers are very active in this area, and you should contact the provider directly for their current statement of position on recovery.

more complicated and expensive Storage Area Network (SAN) replication for continuous data backup. The Federal Emergency Management Agency (FEMA) recommends

FOR THE INVESTMENT IN HARDWARE, BACKUP APPLIANCES MAY HAVE THE BEST VALUE FOR THE DOLLAR SPENT IN THE TECHNOLOGY INDUSTRY.

Close to a Magic Formula

A key advantage to backup appliances is that they can work as virtual servers during hardware failures. In effect, the most common issue, hardware failures, can be addressed by simply making a decision, and starting up a virtual machine to run the application(s) using current data on the backup appliance. Since backup appliances back up data on a frequent basis (typically once every 15 minutes) and can back up from one backup appliance to another or into the cloud, you have a local solution that has protection with an off-site copy. If your cloud provider allows the option, you can do a

reverse backup from the cloud to an appliance.

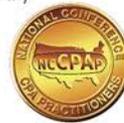
If you have a multi-site organization, you can backup in one location on a near continuous basis, and automatically have an off-site copy of your data every night. Wherever a backup appliance is running, one or more virtual machines can be started on the backup appliance, keeping your organization functioning in the face of a small or large scale disaster. For the investment in hardware, backup appliances may have the best value for the dollar spent in the technology industry. If a backup appliance saves your business, you will consider them priceless. ●

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A Journey of Understanding – How One Firm is Reaping the Benefits of Marketing

Kristy Short, Ed.D

The owners of Mattingly Zsebe, PA weren't any different from most practitioners in terms of how they viewed marketing. In essence, "Marketing sucked...it didn't work...it was a waste of time." These were the sentiments of the partners, Bill Mattingly, CPA, and Dylan Zsebe, CPA, *before* they started their *journey of understanding* just a year ago.

"I remember sending out a few letters and getting no response," Zsebe recalled. "I was frustrated right off the bat and immediately declared that marketing didn't work."

Over time, however, and with the right level of guidance, what Zsebe and Mattingly learned was that marketing does work. They also learned that their feelings about marketing were based in fear—fear that comes from a lack of understanding.

The partners decided to get their feet wet in marketing a few years back. As with most businesses, the economic downturn hit the firm hard. The downfall of the construction industry (the firm's core client niche) equated to a huge loss in book of business. This meant that the firm

needed to bring in more business. But beyond referrals, they didn't know how.

"We had our sights set on bringing in new business," said Bill Mattingly. "We purchased a list and sent out letters. We thought that would do it."

When initial attempts at marketing failed, firm owners became dismayed. What they didn't yet know is that marketing is an ongoing process...that it takes time for the seeds of communication to germinate. They were unfamiliar with the two core elements of a successful marketing communications program: frequency and consistency.

"We just didn't give it enough time and effort," stated Mattingly. "We also failed to realize the gold mine of new business in front of us...our current clients. We were so focused on new leads that we didn't take advantage of the low-hanging fruit. It took bringing in a marketing expert to help us see all of this and get our program off the ground and where it is today—rockin'."

Once the firm partners took the time to educate themselves on marketing, they were able to move beyond the fear and see what they can accomplish with their efforts.



Bill Mattingly, CPA

The Journey of Understanding

We tend to fear anything that is unknown. When it comes to marketing, there are few that fear it more than accounting professionals. And this is understandable. Historically, marketing has not been an integral element of firm operations, and therefore, not a developed skill of most practitioners.

The journey of understanding begins by simply defining 'marketing.' The term itself seems to cause confusion, so it's time to change it. Marketing, simply, is *communicating*. It's telling your story to clients and prospects in order to engage interest and, eventually, sell your services.

"We had to start with basic education. Once we understood that marketing is really just communi-

cating the value of what we offer, the fog cleared," stated Zsebe.

So if marketing is simply communicating, then the next step is identifying who to communicate to. Most firms forget about their current clients. The fact is that existing clientele represents a clear path to new sales. Clients already know you; they trust you—the relationship is already established. Unlike prospects, who require multiple communication touch points to engage, your clients are already listening.

"This was the biggest eye-opener for us. We were focused on marketing to a list of leads. What we learned was to first go after the low-hanging fruit," said Mattingly. "We worked to identify clients in need of value-added services. Some of our first campaigns went out to

STATS AT A GLANCE

Firm launch: 2000

Total employees: 3 full-time

Home base: Cape Coral, FL

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

Technology of Choice: Thomson Reuters CS Professional Suite, Bill.com, Hosted QuickBooks

small businesses that did not have our payroll service. We've brought in a lot of business from these efforts."

Firm partners have also implemented regular communications to sell existing business clients on their small business accounting package, which offers complete back office services for a fixed monthly fee.

"We've really blown out our client communications program. We have regular value-add service campaigns running monthly, and we also send out a premium client newsletter every other month. We now know how important it is to stay in front of our clients on a regular basis—not just to up-sell on services, but more so to maintain their loyalty long term," stated Mattingly.

Serving as a Yutility to Clients and Prospects

Over the course of their journey, Mattingly and Zsebe also learned the importance of being helpful.

"We do a lot of reading around the concept of marketing, to be sure our techniques are effective. One of the concepts introduced to us this year is called 'Yutility,' and focuses on the importance of being truly useful to clients and prospects," Zsebe stated.

Yutility is a concept based on marketing that is useful. That is, marketing communications that offer helpful information to recipients—such as tips, tactics, and detailed instructions—rather than overt sales language. The partners, working with their marketing specialist, developed a series of monthly email communications that offer helpful information ranging from tax due date reminders to accounting how-to's.

"We've gotten a lot of positive responses from our Yutility-based communications. People like the information, and appreciate not being solicited to in every email. Serving as a genuine resource for information has further increased loyalty among our clients and

brought in new leads," stated Mattingly. "It also just feels good to help. After all, this is the foundation on which we built our firm."

Overall, the firm's marketing is solid. In a relatively short period of time, the firm's communication program has gone from a few letters sent out sporadically (with no follow-up) to a full-scale program with several communications launching each month.

"Revenues are up by about 20 percent since we started marketing the right way," Mattingly reported. "The key has been to stick with it and give it time to grow."

Zsebe added, "Persistence is what it's all about...persistence with your communications program and with education. It takes time to understand what marketing is all about, and until you really get it, you can't do it effectively."

Final Words...

The firm of Mattingly Zsebe has come a long way in terms of communicating to key audiences. They've come so far, in fact, that it shows in increased revenue. The combination of focused learning, working with a marketing expert,



Dylan Zsebe, CPA

and a stick-to-it attitude has enabled firm owners to build a marketing program that they can be proud of.

"We receive a lot of comments about our communications...that they are helpful, well done, and innovative. We could never have gotten to this point had we not decided to jump in and stick with it," stated Zsebe. ●



Kristy Short, Ed.D, is president of rwc360, LLC — a firm dedicated to providing branding, marketing, and public relations services exclusively to the accounting profession. She is also a professor of English and marketing. Reach her at kristy@rwc360.com.



ABOUT MATTINGLY ZSEBE, PA

Established in 2000, Mattingly Zsebe, PA provides full-service accounting, bookkeeping, tax, payroll and consulting services to small businesses and individuals in Cape Coral and the surrounding communities.

Cultivating strong client relationships is at the heart of our business. We treat our clients like family, and get to know you on both a business and personal level. We make your goals and priorities our own, and tailor our services to accomplish your specific objectives.

As a Next Generation Accounting Firm™, all of our services are supported by efficient technology infrastructure that offers 24-hour access to your financial information. Regardless of the day, hour or location, you have convenient, confidential access to your financial data with a few clicks of a mouse.

Apps.com Extends Its Global Reach

By Taija Jenkins, Assistant Editor

ate last year, Intuit unveiled its app depot designed to make it easier for small business owners to manage their business. Since its debut, it has seen huge growth in the number of developers creating apps, with new apps being added regularly. In addition, the number of QuickBooks subscribers outside the U.S. has nearly doubled to 46,000, and continues to grow - one more reason Intuit is looking to extend the number and types of apps available to its more than 561,000 online subscribers and 1.57 million users worldwide.

In addition to the apps that are being added, Apps.com is also welcoming several new “first-of-its-kind” apps such as **BuilderTREND** and **JuvodHR**. BuilderTREND is the first construction software app to be offered and provides end-to-end construction management for a variety of builders including home builders, home improvement contractors and sub-contractors. The app allows users to streamline project management tasks such as writing checks, issuing and sharing work and change orders and scheduling. The app also features an auto-shift function which alters the schedule when an item goes over.

“BuilderTREND is an example of an app that addresses a specific vertical and then goes deep to provide users with all the information they need to manage their business,” said Ronny Tey, Group Marketing Manager, Small Business Financial Solutions. “The construction industry is a pretty strong vertical for QuickBooks. There are already apps that integrate with the desktop version, but none in the online space, until now. The accounting profession hasn’t changed much, but now that they are starting to adopt the current technologies, they are looking for apps to meet the same needs as their desktop versions. BuilderTREND is just the tip of the iceberg. There will be more apps coming down the pipeline, expanding vertically and horizontally.”

JuvodHR, the first HR app available on Apps.com, helps employers manage their employees more effectively. From inside the app, users can manage training for employees, as well as their pay. Managers can also use data from the Department of Labor to create accurate job descriptions. Other features include the ability to create and maintain employee reviews and compare employees across job functions.

“When we think about the small business ecosystem, it’s not just about managing the business, it’s also about managing employees,” said Tey. “JuvodHR is focused on a particular horizontal action, which can be applied to any business. The largest expense for a business is payroll. At the same time, owners want to be able to know who their top performers are and how their compensation compares to the rest of the business.”

Intuit is currently bringing on partners that serve various functions in attempts to connect them within its ecosystem and expand its app offerings to customers, as well as its global reach. The company has been working with partners in Canada, the U.K., Australia and India to integrate apps for those regions. With the latest version of Apps.com, developers build versions of their apps to connect through the single API with QB globally.

“While the U.S. still remains the

biggest market, other areas have experienced rapid growth and we want to bring in partners from those areas. We’re starting by asking new partners to go global with us when come on board. We are also checking in with existing partners to see if they would like to extend their current offerings to these markets as well,” said Tey.

As of now, both of the latest apps to Apps.com are available in the U.S. only, but there are a number of apps that are going global. **Transaction Pro Importer** and **Time Tracking by TSheets**, both very popular on Apps.com, have recently been made available in the UK and more are expected to follow. Other apps currently based in the U.S. that integrate directly with QuickBooks on a global scale include:

- **Shoebboxed** (Australia)
- **SOS Inventory** (Australia & UK)
- **Cloud Cart Connector** (Australia & UK)
- **Method** (Australia & UK)

The list of recent apps to join Apps.com includes the following apps:

- **XpandedReports**: This app integrates with QBO to allow users to create additional reports using Excel-type formulas. Users can customize reports by arranging data in the format they need and then saving and rerunning the report.
- **Lettuce**: This online inventory and order management app works with both the desktop and online version



of QB. Users can automate the order fulfillment process and sync it with QB for more effective and efficient management of order, shipping labels and inventory.

- **Exact Online**: This app helps users manage manufacturing and wholesale distribution from a large company
- **FundBox**: A relatively new app that helps QB users advance invoices.
- **Core Financial Dashboard**: Currently, only available for the desktop version, this app provides SMB owners with a dashboard to get a complete picture of their business performance. Users can forecast, look at trends, view industry benchmarks and set goals. The dashboard also has a similar look and feel to QBO with its red, yellow, and green colors.

A complete list of apps currently available for QuickBooks in the UK (<http://www.intuit.co.uk/quick-books-add-ons.jsp>) and Australia (<http://www.intuit.com.au/quick-books-online/add-ons.jsp>) can be found on the countries’ respective websites. Several apps use OneSaas, a systems integrator, to integrate with QuickBooks. ●



Taija Jenkins is an assistant editor for CPA Practice Advisor.

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REVIEW SECTIONS

BASIC SYSTEM FUNCTION

- Installation Ease
- General Navigation & Ease of Use
- Industry-Specific Templates
- Industry-Specific Features
- Platform Support

CORE ACCOUNTING CAPABILITIES

- GL/AP/AR Functionality
- Sales Tax Functionality
- Payroll Functionality
- Audit Trail
- Multi-Currency
- Multiple Language Support
- Multi-Location Support
- Multiple Users

DAY-TO-DAY OPERATIONS

- Sales/Point of Sale/Shipping
- Customer/Vendor Employee Management
- Inventory/Purchasing
- e-Features
- Remote Access

MANAGEMENT FEATURES

- Dashboard Overviews
- Reporting
- Security Features
- Integration/Import/Export
- Data Transfer
- External Integration
- Online Accountant Transfer Tool

HELP/SUPPORT

- Built-in Support Features
- System Updates
- Support Website/Documentation
- U.S.-Based Support

2014 Review of Practice Management Systems for Accounting Firms

As the space for practice management applications has changed over the last year, we have changed the way we review these products to reflect the desire of many mid-sized and large firms to implement staff scheduling tools.

Our review of practice management systems for professional tax and accounting firms includes the following applications:

- **APS by Commercial Logic, Inc.**
- **PowerPM by Commercial Logic, Inc.**
- **CCH Axxess Practice by Wolters Kluwer Tax & Accounting**
- **ProSystem fx Practice Management by Wolters Kluwer Tax & Accounting**
- **Practice CS by Thomson Reuters Tax & Accounting**
- **Empire Suite by WSG Systems, Corp.**
- **Practice Management 2014 by Office Tools Professional, Inc.**

For our reviews, we divide accounting firm management systems into two categories:

- Practice Management Solutions, and
- Time and Billing Solutions.

The difference between these two types of applications is as follows:

Time and Billing solutions are designed to track and accumulate time, report and create bills based on it, and manage the related accounts receivable. These applications are typically designed with features shelves the firm with its internal bookkeeping and cash flow management.

Practice Management applications are more substantial tools which are designed to provide the information needed to effectively manage firms. While all time and billing applications will track time and create client invoices based on these records, practice man-

agement is a more esoteric concept which may include integration into the firm's processes and workflow, document management, and customer/client relationship management. Practice management systems may provide tools for project management and advanced features like support for accrual-based percentage of completion accounting, time budgeting and variance analysis, reporting related to realization, and creation of routine correspondence like standard engagement letters.

Many practice management solutions are designed to meet the needs of larger firms, and are not designed for small firms. Some of the more common features included with practice management applications are:

Integrated Client Portals - These optional websites are designed to facilitate the exchange of information between the client and the practitioner. Some of these solutions will also allow the firm to present billings and allow clients to pay their invoices from within this website.

Project Management - The project management tools in most practice management applications are designed to track project due dates, monitor resource usage, and produce budget versus actual reporting. Some of the higher-end solutions like Empire Suite from WSG Systems support resource scheduling for large projects. Although these solutions may require more investment, the logistics of trying to schedule 20 staff auditors can take the joy out of a practice, so they are usually well worth the price.

Workflow Management - The workflow management tools in most practice management solutions are designed to provide simple engagement tracking and task tracking for the firm. These tools are often not much more

than a digital version of a routing slip which communicates information about a project, how it is to be delivered, and any special processing considerations for the administrative staff.

Timers - These automated tools are used to track time associated with a task for reporting into the practice management system. The timers in most systems can be assigned to a particular client, an engagement or a service code, and give the practitioner a spot to enter detailed notes for use when billing the engagement.

Contact Management and Customer Relationship Management - Many of the solutions will synchronize data with of Microsoft Outlook, so that client information can be populated in a staff person's address book automatically out of the practice management system.

Calendar Management - Some applications will allow staff to enter client notes and billing data into appointments and have the details flow through to the practice management software.

While many of these tools are limited in their scope, some are particularly impressive and should be examined by large firms that are considering replacing their practice management solution and/or implementing resource scheduling software. ●



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

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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.

Commercial Logic APS Advance Practice Management

Read the full review and see expanded ratings for this product online at: www.CPAPracticeAdvisor.com/11384774

2014
OVERALL
RATING

4.75

BEST FIT

Firms of 50 or more employees looking for a customizable solution to manage staff, projects, and serve as the firm's tool for managing client billings.

STRENGTHS

- Designed to meet the needs of large accounting firms
- Very impressive customizable dashboards
- Direct integration with business intelligence software
- Supports multiple locations and departments

POTENTIAL LIMITATIONS

- APS is a best-of-breed application, and is not part of a large suite of solutions for accounting firms.

APS Advance Practice Management is an Australian practice management solution which is exclusively offered in the U.S. by Commercial Logic, Inc. Data for implementation is gathered by CLI early in the process and the application is custom configured to meet the needs of each specific accounting firm. CLI is also the publisher of another practice management application, Power PM, which is reviewed separately in this issue.

SUMMARY AND PRICING

APS Advance Practice Management is a flexible tool which allows firms to embed their processes into the software through custom configurations and integrations with other products. The business

intelligence feature is very impressive, and should be examined by large firms who are considering a new practice management application so that they can get some perspective on the advanced functions available in this reasonably priced application.

APS Advance Practice Management includes the core time and billing module, the client contact module, the staff management module and the workflow toolkit for approximately \$300 per user. The optional APS Advance Practice IQ application is sold and implemented separately.

APS Advance Practice Management is a customizable solution which best meets the needs of large accounting firms. The solution is built on the Microsoft SQL server

platform. The application is flexible enough that the firm will need to know how they want to work with the application, and should not expect a "standard" implementation with this very powerful and flexible tool kit. A number of stock dashboards are provided with APS Advance Practice Management, but users will want to configure the metrics tracked to meet their firm's specific requirements.

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FIRST-HAND

How a Growing Firm Achieved Success with APS Advance Practice Management

Managing a successful accounting firm takes much more than a strong focus on clients and an expertise in managing books and taxes, especially when the firm has multiple locations and more than two dozen staff members. To achieve success, firm partners must be able to oversee the productivity and progress of all of the processes taking place in their practice, and proactively work to maintain and refine best practices.

THE CHALLENGE OF FIRM GROWTH

But what does an accounting firm do when it has grown in size and needs more advanced capabilities than its practice management system can offer?

For Kathy Klang, a CPA and the managing partner of the Minnesota accountancy Cummings, Keegan & Co., PLLP, the choice was simple: It was time to find a new solution.

The firm, which has a diverse client base and offers accounting, tax, audit, business planning and additional client services, was looking for several features it wasn't getting from its existing program:

- Enhanced and customizable reporting
- Faster access to real-time data
- Top-level managerial insight
- Greater integration with tax, CRM and Microsoft Office and Outlook

FINDING A NEW SOLUTION

Klang and the firm's other partners spent about a year looking at a variety of programs available for firm management, using demonstration versions of a few and including key managers and staff in testing the systems.

The program they ultimately chose was APS Advance Practice Management from Commercial Logic (CLI). In addition to having comprehensive features, reporting and extensive integration with other core accounting systems, Klang says that a key factor was the firm's long-standing relationship with CLI. The firm had been using other CLI programs since about 1990.

"The PowerPM program from CLI was great for us until our growth and expansion to multiple offices required additional, more customizable insight into firm productivity," she said. "When we were looking at other programs, we naturally looked at CLI's APS." The program is CLI's next generation practice management system.

IMPLEMENTATION AND TRAINING

Since the firm already had a working relationship with the technology provider, working with their support staff on getting the system up and running was a comfortable process, although Klang said the extensive customization functions did require training and guidance from CLI.

CLI helped the firm tailor the program and its reporting tools specifically to its needs at no additional charge.

commerciallogic
The Practice Management People
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LIFE WITH THE APS SYSTEM

The changes definitely paid off as Klang and other firm partners now have instant access to managerial dashboards, detailed reporting and firm oversight, while other staff have access to the data on which they need to focus.

"We are getting much better management information out of the system, including the ability to drill down into the various industry segments of our clients and see our firm's productivity, profitability, services and fees. This lets us identify the most profitable segments that we may want to pursue more clients in."

Since moving to APS a little more than two years ago, the firm has achieved greater productivity and has grown in staff size, part of which Klang attributes to the analysis and reporting that the system offers.

"APS has everything we knew we needed, as well as additional tools and features that have helped us become even more productive. And the ability to stay with CLI was an added benefit because we were already comfortable working with them and respected them as a business."

READ THE 2014 REVIEW OF
APS ADVANCE PRACTICE MANAGEMENT

CPA Practice
Advisor

CCH ProSystem fx Practice Management

2014
OVERALL
RATING

4.5

BEST FIT

Mid-sized and larger firms who use multiple components of the ProSystem fx Suite for accounting professionals and their firms.

STRENGTHS

- The ProSystem fx Practice Management application has had a long history across multiple vendors, including CPASoftware, Sage, and CCH, and has existed in some form for at least 15 years.

- The application supports dashboard reporting, and is stable and scalable to firms of all sizes.
- Although this application is the legacy application, it still has a good feature set, and has been kept up over the years in spite of its age.

POTENTIAL LIMITATIONS

- As a legacy solution, ProSystem fx Practice Management does not have the cloud capabilities of its more current sibling, Access

Read the full review and see expanded ratings for this product online at: www.CPAPracticeAdvisor.com/11384758

Practice Management. Integrations with ProSystem fx Practice Management may require custom programming, which may not be supported by CCH.

- The only accounting applications supported are the CPA Accounting solution from CCH, Sage 100 ERP, and Sage 500 ERP, which may be limiting to many firms.

- The solution does not have comprehensive scheduling tools although these are available from

third parties for a separate charge

SUMMARY & PRICING

CCH ProSystem fx Practice Management is priced starting at \$855 for the basic edition, with significant discounts available for large firms as well as those who use multiple CCH products.

www.cchgroup.com

Practice Management 2014 – Office Tools Professional

2014
OVERALL
RATING

4.5

BEST FIT

Firms from 2 to 50 that need an integrated tool for storing and retrieving documents, staff workflow, time and billing, and light CRM capabilities. Practice Management 2014 is particularly well suited for firms that want to increase the effectiveness of their communication between members of their team and those who wish to make it easier for administrative staff and paraprofessionals to answer routine client questions.

STRENGTHS

- Practice Management 2014 from Office Tools Professional offers

a wide range of features, and is the only application included with this review which integrates time tracking, billing, light CRM capabilities, work status tracking, document storage, and a client portal into a single solution.

- The application can run on a local server or be provided as a hosted solution from a number of commercial hosting companies.
- New features include an alert and instant messaging interface for communication within the firm, as well as integration with Intuit's DemandForce marketing

and communications application.

- Practice Management 2014 now includes a AIMI (alert and instant messaging interface). This solution makes it possible for team members to send each other instant messages from within the application.

POTENTIAL LIMITATIONS

- Practice Management 2014 is designed as a single integrated application to accomplish multiple tasks within a firm.
- Prior versions of the application have required a high end computer (Core i7 processor, 8GB

RAM) to work effectively.

SUMMARY & PRICING

Practice Management 2014 starts at \$600 per user per year for a single user. A five user package is \$1,600 and a 10 user package is \$2,900. Client portals are priced starting at \$360 for a 5 GB monthly package, and users can either subscribe to video training or create a personalized custom training program based on hourly rates.

www.officetoolspros.com

Read the full review and see expanded ratings for this product online at: www.CPAPracticeAdvisor.com/11384815

Empire Suite by WSG Systems, Corp.

2014
OVERALL
RATING

5

BEST FIT

Mid-sized and larger accounting firms that need scheduling and resource management, invoicing of time and expenses, and customer relationship management.

STRENGTHS

- Empire Suite is one of the only systems in this review which includes both customer relationship management as well as staff scheduling.
- The Empire Resource scheduling module can be used along with

CCH Access Practice and ProSystem fx Practice Management and has good out of the box integration.

- The application is used by firms as small as seven users, and effectively supports firms with thousands of users across multiple offices.
- Tight integration with Microsoft Outlook, with embedded metadata on projects included within appointments and other records in Outlook.
- Empire Suite is available as a

Software-as-a-Service model, installed or via a private-cloud environment.

POTENTIAL LIMITATIONS

- The staff scheduling module in particular requires a large staff pool to use effectively. WSG Systems reports that most of its staff scheduling users have 20 or more field auditors, and 40 or more total users.

SUMMARY & PRICING

Empire Suite is sold on a subscrip-

tion basis, with projects and CRM each starting at \$20 per user per month, time and expense starting at \$15 per month, and scheduling/resource management at \$12 per user per month. Optional add-ons for Outlook time entry, Microsoft Project integration, and smart phone access, are available for \$6 per employee per month each. QuickBooks integration is priced at \$50 per month.

www.empiresuite.com

Commercial Logic PowerPM

2014
OVERALL
RATING

4.25

BEST FIT

Small to midsized firms who need time, billing and reporting capabilities as well as project management features from a practice management solution which is hosted on a cloud-based server. PowerPM is designed to handle from 5 to 100 timekeepers, and is used by firms as large as 300. Although the application was designed for accounting professionals, the publisher reports that the solution has been used successfully by a wide range of professional service businesses

including attorneys, architects, engineers and consultants.

STRENGTHS

- PowerPM is supported on almost any computer or mobile device, and is only available as a hosted solution
- Users can license only those modules which are necessary for the desired features.
- PowerPM user locations are required to have a fixed IP address so that users are allowed to access the application.

Read the full review and see expanded ratings for this product online at:
www.CPAPracticeAdvisor.com/11384794

POTENTIAL LIMITATIONS

- The user interface feels dated when compared to some of the other solutions in this section, although the menu structure is well organized.
- The application does not offer a version of the application for use with mobile devices.

minimum user count of 10 and a \$200 minimum monthly recurring license fee, plus a one-time \$1,000 setup fee. PowerPM starts at \$20 per user per month for the first fifteen users and drops to as low as \$10 per user per month for organizations who need over 100 named users. PowerForecast is priced at \$2 per user per month, and the Trak-Date Due Date Tracking application is \$4 per user per month.

www.cli-usa.com

SUMMARY & PRICING

PowerPM is accessed using Microsoft Windows Server Terminal Services, and user licenses are purchased in units of five, with a

Thomson Reuters Practice CS

2014
OVERALL
RATING

4.75

BEST FIT

Organizations that use the Thomson Reuters CS suite of applications for professional accounting firms, especially those that use the NetClient CS portals, Virtual Office CS, and GoFileRoom ES. The application meets the needs of most firms from two users up to about 40 employees.

invoices to clients through the NetClient CS portals, and clients can pay their bills to the firm via ACH using an optional service from Intercept EFT.

STRENGTHS

- Written using modern .NET development tools and customizable based on user preferences.
- Uses easy-to-understand dashboard views
- Firms can electronically present

- The application can be installed on a firm's internal network, hosted on Thomson Reuters network using Virtual Office CS, or hosted by a third party IT service provider.

POTENTIAL LIMITATIONS

- There are few, if any, integrations with between Practice CS and products outside of the Thomson Reuters CS Suite.
- The optional project manage-

Read the full review and see expanded ratings for this product online at:
www.CPAPracticeAdvisor.com/11384860

ment module is required to implement workflow management using Practice CS.

- Firms with complex departmental structures and those with more than 40 users might want to consider the Thomson Reuters Elite practice management solution. Although Elite was originally developed for law firms, Thomson Reuters has had some success selling this solution into large accounting firms.

optional modules for managing projects, clients, and employees, Practice CS provides a comprehensive toolset which meets the needs of many small and mid-size firms.

SUMMARY & PRICING

Practice CS is priced starting at \$2,050 for a five-user license, with the project management, client management, and staff management modules all available as add-on features

www.thomsonreuters.com

CCH Access Practice

2014
OVERALL
RATING

4.75

BEST FIT

Firms that are using the CCH Access suite of next-generation applications for mid-sized and large CPA firms.

and can be customized to meet the needs of almost any practitioner.

STRENGTHS

- Access is built on the latest cloud database and programming platforms which gives firms maximum flexibility in how they choose to configure their technology infrastructure.
- The user interface is very flexible

- The workflow engine within Access Workstream is how all workflow is managed in Access, and this model is sold separately.

POTENTIAL LIMITATIONS

- The application is only available as a hosted solution on CCH's server farm.
- The user interface includes a ribbon component similar to that

Read the full review and see expanded ratings for this product online at:
www.CPAPracticeAdvisor.com/11384736

included in Office 2007 and later. New users may find that the user experience changes significantly between the legacy application, ProSystem fx Practice Management, and the current application, Access Practice.

- Although there is an open integration platform for the CCH Access applications, CCH has not thus far exposed many of the applications and data in the suite for use with add-in applications.

SUMMARY & PRICING

Access Practice is priced starting at \$255 per user per year, with significant discounts for multiple modules and large user counts.

www.cchgroup.com

Accountants at Work (and Play) Post-April 15

Gail Perry, CPA, Editor-in-Chief

What is at the top of your accounting firm's agenda when the sun rises on April 16? Is it all crash and burn? Do you have a pile of unanswered messages and unread articles to plow through?

For many accountants, there will be celebrations. Others will be participating in community events, diving right into the next busy season, planning summer CPE, or de-briefing. One firm plans to take the entire firm plus guests on a celebration trip.

Some of our readers took time out of their uber-busy day to share their post-busy-season rituals with us.

- **Kemper CPA Group** will devote some of the post-April 15 time to making plans for the various CPE courses and programs staff members will attend over the summer. They'll also determine who will participate on various audit teams, and there will be an after-tax-season celebration. Some of the offices invite family members to the parties as a way of thanking them for their patience during tax season. There will be client appreciation events as well, and one

of the Kemper offices takes an annual group portrait of the team right after busy season and hangs it in the lobby. There is a gallery of previous pictures so everyone can see who has worked at the firm over the years.

- **Debi Gellenbeck**, COO of **Rea & Associates** in New Philadelphia, OH, said, "I hope to have a face-to-face busy season de-brief from an operational perspective. We've done it in the past and it's a real eye-opener on the differences between offices, but also a way to share best practices." In addition, the firm will "schedule an IT steering committee meeting to address client service applications with the intent of moving everything to the Cloud by the end of 2015."
- **Kenneth Miles**, managing partner at **NSBN CPAs** in Beverly Hills, CA, told *CPA Practice Advisor* that "First and foremost, we always follow up with clients on additional needs we

identified during tax season." He added, "Every spring the partners and staff participate in a firm-wide charity event for the community, whether a 5k walk, serving dinners to the homeless, or cleaning beaches, as part of our 'TEAM NSBN Takes Action' program." In addition, this year NSBN will be continuing to ease the transition for clients as a result of a recent merger with another firm.

- **Accountants at Freed Maxick CPAs** in Buffalo, NY will barely have time to catch their collective breath before diving into recruiting season prep, community relations (employee participation in charity runs, golf outings, and support for clients' fundraising efforts), training for the annual JP Morgan Corporate Challenge team races later this spring, and a young professionals volunteer event. In addition, the firm is following up traditional tax season with pension season, governmental season, and then it's time for another tax season. "There is very little down time anymore," according to our sources, Shawn Frier, director, and Emily Burns Perryman, integrated media & digital strategy supervisor.

- **James Moore CPAs** in Gainesville, FL will set aside some time to assess the success of the Lean methodologies they implemented into their tax processes. And they are planning an April 15th party.
- According to Felix Lozano, partner-in-charge of audit at Texas's **Whitley Penn CPAs**, "Our CPAs and support staff work very hard during busy season to service our clients. As a reward, we will celebrate by taking a firm trip to Florida. Every other year, we take all firm employees and a guest on a trip to celebrate all of their hard work and dedication to the firm and our clients. This allows time for everyone to decompress together and build camaraderie for the next busy season. ●

Who's Who

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THE TAX &
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TECHNOLOGY IS YOUR FIRM'S STRATEGIC PARTNER

The success of your firm depends on many day-to-day internal workflow factors, but none are as important as how well you help your clients succeed in their business and personal financial and management goals. After the client service component, virtually everything else that goes into your work product is logistics and workflow.

- The technologies you use to get your work done
- How you provide finished products for your clients
- The ways in which you collaborate with staff and clients
- Whether your firm is preparing for future client needs

The solutions you use may come from a single vendor, or from many. The best solution to your needs, after all, is what works best for your firm and how you adapt to new practices and adopt the use of technologies that contribute to a more efficient workflow process. Just as one of the most important factors in your success is your relationship with your clients, one of the greatest impacts on firm workflow is the dedication of the makers

of those programs, services, apps and hardware to you as their client.

The most effective technologies for accounting and tax professionals are developed by vendors who understand the unique needs of the profession and who actively communicate and work with professionals to continue to know the real needs and pains that you have in your day-to-day workflow. Sometimes these are the large technology giants that are common names, but they are also small technology specialists, often with accounting professionals at their senior levels.

The technology and service providers in this special "Who's Who" section are among those who have dedicated their own businesses to helping practicing public accountants and tax professionals be more productive and efficient in managing their firms and serving their clients. Take some time to get to know them, and you may find a technology or strategic partner that can help your practice realize success in the near term and the future.

Wolters Kluwer CCH	24
Cloud9 Real Time.....	26
DOC.IT USA	28
Intuit	30
Office Tools Professional	32
SurePayroll	34

Who's? Who

AMONG
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Wolters Kluwer, CCH

2700 Lake Cook Road
Riverwoods, IL 60015

Phone: 800-PFX-9998
Email: Support.CCH.com/contact
Web: CCHGroup.com
Number of Employees: 3,500
Year Founded: 1913

COMPANY DESCRIPTION

As firms strive to grow, manage and protect their business, they look for opportunities to collaborate with clients and provide higher value services. They need workflows and solutions to drive greater productivity and profitability. They need greater mobility, simplicity and speed. And, they need a business partner they can count on to help. That's what Wolters Kluwer, CCH delivers.

With over 100 years of experience delivering industry-leading software solutions, research and expertise to tax and accounting professionals, Wolters Kluwer, CCH is passionate about helping firms thrive.

Wolters Kluwer, CCH began this commitment in 1913 with the introduction of the first tax law reporting service, and we remain steadfast in this commitment today.

SOLUTION

At the center of a well-run firm is the *right* technology that fuels **growth**, supports effective firm **management** and **protects** the firm's reputation. That solution is CCH Access™ — the profession's first modular, cloud-based tax preparation, compliance and firm management solution that can be tailored to meet the needs of any firm.

From a single solution, firms can:

- Accelerate **Growth** — providing tech-savvy services that build positive client relationships and lead to higher-billable work and new business.
- Enhance Firm **Management** — simplifying data management, standardizing workflow processes and elevating efficiency.
- **Protect** their Reputation — remaining compliant with regulations and offering heightened security to safeguard sensitive client data.

CCH Access is the only complete tax practice application built on a single platform that leverages a single integrated database. The centralized database allows users to:

- View, manage and access all functions through a common dashboard
- Set up permissions through the administration module
- Access document management and firm management tools
- Improve collaboration with clients

Available as one solution or as individual modules, CCH Access includes:

CCH Access™ Tax: the heart of a streamlined, digital tax process — supporting ease of tax preparation with thousands of automatically calculating forms and schedules for federal, state, county and city entities; robust diagnostics; and a state-of-the-art electronic filing system.

CCH Access™ Document:

a feature-rich document management solution to electronically organize and store client source documents and achieve a true digital work environment.

CCH Access™ Portal: a secure online space where clients have 24/7 access to financial documents and the ability to collaborate with firm staff in real-time, at any time.

CCH Access™ Practice: a full-scale practice management system to monitor staff time, produce invoices and handle all aspects of managing firm operations.

CCH Access™ Workstream: a full-featured project management solution designed to streamline administrative tasks, such as tracking due dates, identifying key milestones and monitoring project status.

All in all, CCH Access represents the profession's most powerful solution to grow, manage and protect firms.

MARKETS SERVED

Wolters Kluwer, CCH solutions are relied upon by CPA firms of all sizes, thousands of corporations worldwide, the IRS, and the nation's courts and agencies. Customers include small, medium and large accounting firms, and corporate tax and auditing departments.

CUSTOMER SUPPORT

Wolters Kluwer, CCH customers receive support and service from knowledgeable industry professionals. Technical support can be found at **CCHGroup.com**.





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Streamline processes for effective firmwide management by utilizing a completely integrated software solution that operates on top of a single, centralized database — allowing for a seamless flow of data between applications.

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Manage risk and safeguard your firm's reputation by keeping current on changing tax laws, maintaining compliance across the board and offering heightened security of your client data.

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Wolters Kluwer
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Who's? Who

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Phone: 888-869-0076
e-mail:
info@cloud9realtime.com

Number of employees:
45 employees serving
over 19,000 users

Location: Data centers in
Texas and California

**Serving the Accounting
profession since:** 2000



SERVICES OFFERED:
Custom Virtual Server Hosting
Application Hosting
QuickBooks and Sage hosting
Microsoft Exchange Services
Technical Support

COMPANY OVERVIEW

Cloud9 Real Time is an Accredited Managed Service Provider delivering dynamic Cloud Solutions for Anytime, Anywhere access. Cloud9 is licensed by both Intuit and Sage for Commercial Hosting and offers a customized, privately labeled all-in-one virtual office solution. Voted best Hosting company by the *CPA Practice Advisor Magazine* 3 years running, named the K2 Quality Award winner for Best Cloud Provider and receiver of the 2013 Sleeter Awesome App Award; Cloud9 Real Time is the most award-winning ASP/Host solution for Accounting Professionals.

Cloud9 Real Time provides clients a secure and private cloud solution. On the forefront of cloud computing, giving users access to their Applications, Data and Exchange services in one central location, Cloud9 Real Time offers QuickBooks hosting as well as custom virtual server creation. Never charging for storage, IT or maintenance, get your business on Cloud9 today!

HOW CLOUD9 IS DIFFERENT

Cloud9 doesn't build cookie cutter solutions. All solutions are custom built to the individual firms needs, therefore they have the same freedom and flexibility they would with a local infrastructure. The private environments also allow for greater security to the end-user and flexibility in customized backup schedules. We also don't limit what you can or cant host - if you have the proper licensing, and its compatible with our environment then you can host it with us! So

whether you are a Thomson firm, a CCH firm or use products from multiple lines, you have one central location for all of your applications, data and users. Cloud9 also doesn't charge monthly storage fees, server administration fees and provides all inclusive pricing so you know exactly what to budget for year round.

CLOUD9 SUPPORTING THE WORK-LIFE BALANCE

Research suggests that workers are now focused on better quality of life than earning a higher paycheck. The countless hours in the office must be offset with more vacation time and/or other complete compensation packages that are more enduring than the standard salary with expectation of 60+ hour weeks. With that said, Cloud9 strives to offer technology solutions that give more flexibility to the firm and their staff by allowing anytime, anywhere access from ANYTHING!

The world as we know it is becoming more and more dependent on mobile devices. Moving to the Cloud not only removes the need for a brick and mortar office but also provides the convenience of being device agnostic. This opportunity allows a Partner to make their child's school play whether all the work is complete at the office or not, they can simply login on their phone or laptop later to complete the final tasks left undone.

Website: www.cloud9realtime.com



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September 17,18,19 • San Diego, California

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Who's? Who

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DOC.IT

USA

723 South Casino Centre Blvd.,
2nd Floor
Las Vegas, NV 89101-6716

Canada

445 Apple Creek Blvd, Suite 206
Markham, ON L3R 9X7

Phone: 888-693-6248 (Ext. 1)

Website: www.Doc-It.com

Number of employees: 25+
Year Founded: 2000

COMPANY OVERVIEW

Doc.It® has established a long-standing presence in the market providing document management and workflow solutions that meet the needs of firms of all sizes due to their leadership philosophy of customer-guided software development. Doc.It® has strong financial backing and experienced leadership which ensures long-term staying power and support for expansion throughout North America. Doc.It®'s leadership team believes in strategic growth and maintaining the perpetual culture of customer care.

Doc.It®'s Innovation Award-winning Doc.It® Suite is a powerful scalable collection of document management and workflow solutions for accounting firms of all sizes. Doc.It Suite streamlines workflow as firms gather, process, store and deliver documents. Doc.It Suite is used by over 10,000 accountants throughout North America.

MARKETS SERVED

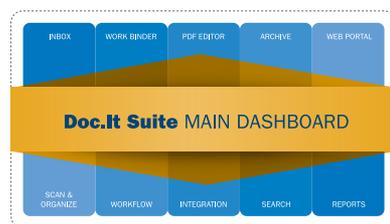
Accounting firms of all sizes throughout North America.

PRODUCTS

Doc.It® Suite includes:

> Main Dashboard

Doc.It leads the industry with the most powerful and effective workflow and document management interface. With Doc.It's Main Dashboard, everyone has access to work tasks, client Work Binders, documents, the Archive, and a complete set of fully integrated tools.



> Inbox

The Doc.It Suite Inbox is your temporary storage location and routing utility for all printed or scanned PDFs. Documents can be sent to co-workers, Doc.It Work Binders, other binder systems (i.e., CaseWare, fx Engagement) or to the secure Doc.It Archive. The Inbox contains useful utilities for quickly manipulating and assembling PDFs.

> Scan and Organize

Doc.It Suite includes scan and optical character recognition (OCR) support for all types of scanners with built-in features to ensure the accuracy of scanned documents. As documents are gathered, Doc.It's Automatic Forms Recognition (AFR) technology identifies, names and organizes an unlimited number of document types.

> Policy Manager

Doc.It's Policy Manager ensures uniformity across the firm by applying the firm's file naming and retention policy to all documents as they are gathered and then prepared for storage.

> Work Binders

The Doc.It Suite client Work Binders organize documents of all types and formats. Documents are gathered and remain in the Work Binder in their native file format. Work Binders provide staff and partners immediate access to all of the documents needed to complete work tasks.

> Workflow

Doc.It Suite is designed for logical workflow for every engagement type. Doc.It Suite automates workflow by intelligently notifying the next-in-line when a task is ready to be worked on. Doc.It's powerful Main Dashboard interface provides seamless integration with an entire suite of tools. Stay on top of workflow using the all-new Binder Explorer to monitor due dates, route or reroute work and oversee staff workload to resolve bottlenecks when they occur.

> PDF Editor

Doc.It's PDF Editor is used to annotate, bookmark, merge, append and highlight documents. Users can also easily run an electronic calculator tape and apply hundreds of accounting-specific tick marks.

> Document Publishing

When an engagement is complete, Doc. It's publishing tool collects all documents associated with an engagement and combines them into a single fully indexed, bookmarked PDF as a complete record of the finalized engagement. Once published, this PDF is stored in the Doc.It Archive.

> Document Archive

The Doc.It Archive is where firms store fully indexed, bookmarked PDF files, independent of the engagement's originating software. Easily transfer documents from the Archive to clients using the integrated Web Portal or email. Your firm retains complete control of your data, and you are free to change vendors or easily get data out if a partner leaves or if a merger or de-merger happens.

> Cloud + Mobile

We provide customers with access to their data anywhere, anyplace, anytime, and the ability to easily exchange documents with their customers. We offer customers the flexibility to deploy Doc.It Suite on-premise, hosted in the cloud, or via a hybrid of the two. Customers access and conveniently browse and deliver documents while on the go from their laptop, iPad or Android tablet.

> Web Portal

Doc.It Suite Web Portals give clients secure easy access to documents such as financial statements, tax returns, invoices, large bookkeeping files and any other reports you would like to share and make available to them.

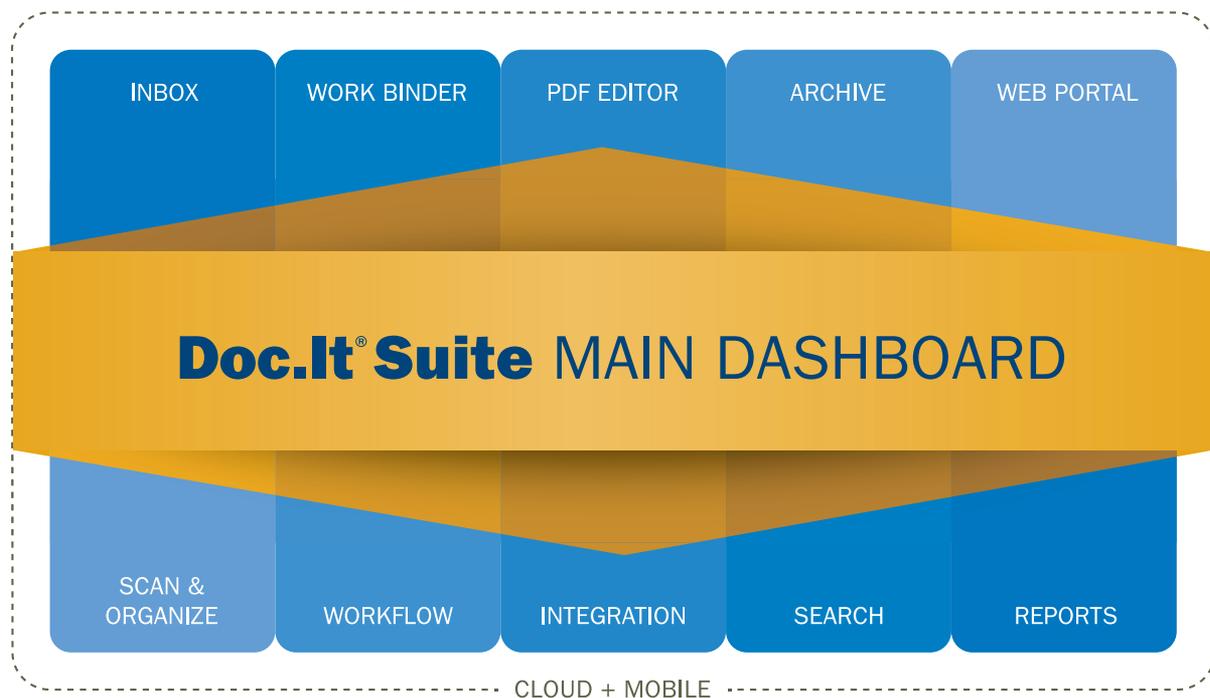
CUSTOMER SUPPORT

Doc.It clients receive professional services and support during the onboarding process and afterwards. Customers are provided with pre-implementation project planning and post-implementation telephone and online support, in addition to free unlimited access to web-based training videos.



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- What success looks like, and
- A simple model that demonstrates how document management and workflow software fits into your firm.
- Optional 15-minute product demonstration will follow.

Working Smarter with Document Management and Workflow

- Learn how Doc.It software works in an accounting firm
- Experience a product demonstration
- Learn how Doc.It's solution impacts processes while eliminating document management and workflow challenges

RESOURCES

- ✓ Top 12 Signs Indicating Your Firm Needs Document Management and Workflow Software
- ✓ Top 20 Questions to Ask a Document Management and Workflow Vendor
- ✓ Selecting Document Management and Workflow Technology

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Who's? Who

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2632 Marine Way,
Mountain View CA 94043

Phone: 650-944-6000
Website: www.Intuit.com
Number of employees: 8,200
Year Founded: 1983

intuit®

Q: Last year, Intuit reorganized its business units to focus on two strategic outcomes: to be the operating system behind small business success and to do the nations' taxes in the U.S. and Canada. How does your group, the Accountant and Advisor Group (AAG), ladder up to those outcomes?

A: Accountants provide the foundation for Intuit to achieve these goals: we recognize and understand that accountants are our partners as we both strive to help small businesses succeed. We serve accountants worldwide, delivering awesome products that help them better service their clients and at the same time make them more productive, save time and grow their practices.

Q: As the new leader of AAG, what area will you focus on first?

A: Our customers. Having close relationships with our customers is an important part of Intuit's culture, and the accounting community is no exception. By being close to our customers, our team is able to learn what emerging trends are making accountants' jobs easier and more efficient and also what new challenges they face. We can then use those trends to drive product development, which energizes and encourages our customers and employees alike because we are truly meeting the needs of our customers.

Q: Do you have any specific examples of how you are working with customers?

A: Interacting regularly with customers is a top priority. We reach out by phone to our ProAdvisors to find out what they like about the program and what improvements they want to see. We call customers who are putting a client on QuickBooks Online for the first time to hear how the experience went and where we could do a better job. It's these types of interactions that help us understand why, how and what motivates accountants.

Q: You mentioned that saving accountant's time is a big focus for Intuit. What is AAG doing to support that?

A: We continue to focus our efforts on finding ways to help accounting professionals be more efficient and save time, as well as grow their practices. One way we do that is through our offering, QuickBooks Online Accountant. We've added the ability to view and filter all your accounting and tax clients through a Single Client List. We added Notes and Task functionality and have enabled firm member invitations, all of which enables better collaboration within a firm and improves client service. And to top it off, now there is wholesale pricing so accounting professionals can now set up new QBO clients at a significant perpetual discount.

Q: Cloud is here to stay, yet some accounting professionals are still hesitant to adopt cloud computing technologies. What advice do you have about going from desktop to cloud?

A: The benefits of the cloud are increasingly well understood. Accountants save time collaborating with their clients, accessing the data from multiple locations, and even reviewing work on the go with our mobile applications. My recommendation is to start one new client online; it gives accountants a chance to see the benefits of the cloud for themselves.

Q: What are you most excited about as you take on this new role?

A: Delivering products that help move the needle forward and help accountants move their practices online so they can be more efficient and save time. I am particularly looking forward to the upcoming QuickBooks event in October. It's going to be unlike any industry event you have ever attended. It will provide a unique opportunity for the small business, developer and accounting communities to come together, mix, mingle and share in some combined experiences as well as individual tracks that are designed specifically for them.

ABOUT INTUIT:

Intuit creates business and financial management solutions that simplify the business of life for small businesses, consumers and accounting professionals. The company's 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. Intuit also offers ProSeries®, Lacerte® and Intuit Tax Online, 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.



Jim McGinnis

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*Leader in cloud-based accounting based on number of paying QuickBooks Online companies worldwide, May 2013. ©2014 Intuit Inc. All rights reserved.

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OFFICE TOOLS PROFESSIONAL

514 Commerce Avenue, Suite D,
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Phone: 888-667-8440

FAX: 661-951-3875

e-mail: info@officetoolspro.com

Website: www.officetoolspro.com

Year Founded: 1997

PRICE: \$600/First User,

\$300/additional users

COMPANY OVERVIEW

Serving the accounting profession for over 15 years, Office Tools Professional is a proud developer of the most integrated practice management software in the accounting market. Receiving many accolades as the best solution for the small to mid size firm, Practice Management Software has become the Accountants choice. Awards include two consecutive years *CPA Practice Advisor* "Reader's Choice Awards" for superior workflow software and K2 Enterprises Best Practice Management software.

In our culture it's all about resources. We recognize that to really serve our industry we need to provide the necessary resources to our users. These resources are not limited to our software but include an annual Technology and Practice Management conference and our Magazine.

The annual Technology and Practice Conference includes our User Training and brings together today's thought leaders and industry vendors to resource our attendees. It is also a great opportunity to learn how to use all Practice Management Software features. Every attendee will receive training and a chance to network with other professionals, sharing common problems and exploring new solutions in a round table format and panel discussions.

My Office Today is a magazine that specifically targets small business owners, who feel isolated and lack the resources bigger firms have. My Office Today focuses on relevant topics which are released on our website in blog, video, and print format.

PRODUCTS

As a leader in small office software, we focus on developing software with tools that solve specific problems for the accounting firm. Our unique "Workflow Methodology" uses a single interface that provides access to nearly every office task and function, thus solving client, staffing and workflow problems while providing the following benefits:

- seamless integration
- simplified management
- improved delegation
- increased productivity



Added last year was our client document portal, Client Portal. This portal allows Practice Management users to send confidential documents, messages, invoices and receive payments to clients via a secure portal.

Office Tools Professional has always realized the importance to synchronize data between other software that is used in the office. Import is now available for ALL tax programs.

QuickBooks® Integration Tool - The sharing of critical data like customers, employees, vendors and item codes, enables users to save time and reduce the chance of data entry errors, eliminating duplicate entries between programs. The export time cards option allows you to create payroll for your staff and bill your clients. Utilize all the workflow benefits including billing and tracking A/R in Practice Management Software, taking advantage of incredible reporting and metrics, while synchronizing data with QuickBooks right inside of Practice Management.

Microsoft® Outlook Integration Tool - Integrate Microsoft Outlook calendars, contacts and tasks from Office Tools Professionals schedules, contacts and tasks. Sync in real time all information. Bring in Outlook Email automatically for review and record keeping for the entire staff stored conveniently in the document management system. This feature works with Outlook and Exchange.

Lacerte® Integration Tool - Completely redesigned our award winning Lacerte integration, now built DIRECTLY in Practice Management. Enter new contacts in anywhere (Lacerte or Practice Management) and have the information pass seamlessly into the other software. Sync your contacts or import as well to start your database. Create time cards from Lacerte, bring over invoices, spousal information, dependents, partners and other related records. Choose what works best for you.

Additional integrations available:

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- ProFile (Canadian)
- Microsoft® Excel Data Import Tool - Import from any tax program
- Adobe Acrobat® Toolbar Add-on
- Microsoft® Office Toolbar Add-on
- Laser App®
- Dymo® Label Printer Integration
- Google Maps® Integration

MARKETS SERVED

With over 10,000 users Practice Management for the Accountant is easily integrated into any accounting firm whether you are a CPA's, EA's or tax and bookkeeping professional. Other service professionals such as consultants, architects and attorneys can easily adapt Practice Management to their specific needs too.

CUSTOMER SUPPORT

Office Tools Professional success and growth is built upon exceptional client care. Professional support personnel are available during regular business hours at no charge to end users. We pride ourselves on having a courteous representative answer your questions directly, without having to wait for a call back. Superior customer support has allowed us to achieve a 95 percent customer retention year after year. We have nearly 600 active members in our LinkedIn Group, customers can speak with each other to learn and solve problems while understanding how firms across the globe run their practice. Users can purchase Practice Management software by the Month, Semi Annual or Annually. We are also the only industry vendor that allows a reduced cost tax season license. Purchase this year and find out what our users have known for some time; a firm changing experience that increases billings and reduce costs.





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PRODUCTS:

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The Costs of **DISTRACTED DRIVING**

How often do you talk on the phone, look at email messages, check the news or weather, read or compose text messages while you're driving? We take pride in our ability to multitask, but at what cost? Centuries of accountants managed to drive from point A to point B without phones in their hands. Today, it seems everyone is connected.

Does our connectivity enhance our productivity, or should we rethink how we spend that time behind the wheel?

Author and work-life balance expert Jeff Davidson shares his distracted driving statistics in the latest installment of his monthly work-life balance series, By the Numbers. These sobering numbers might be enough to make you reconsider keeping both hands on the wheel. ●

Texting while driving increases accident risk by

23

times.

NHTSA

Driving while using a handheld or even hands-free mobile device can

delay response time as much as a drunk driver with a 0.08

blood alcohol content.

U. OF UTAH

BY THE NUMBERS

25 PERCENT of U.S. drivers admitted talking on a mobile phone while in heavy traffic.

Insurance Institute for Highway Safety

Worldwide, as many as **1.2**

MILLION deaths

and **80**

MILLION injuries

are caused by distracted driving.

World Health Organization (WHO)

812,000

drivers are distracted by a handheld device at any given moment

U.S. DOT

Half of U.S. drivers admit to being distracted by a cell phone while driving.

Distracted Driver Handbook

A DRIVER TALKING ON A CELL PHONE INCREASES HIS OR HER ACCIDENT RISK BY FOUR TIMES.

NHTSA

45 percent

of poll respondents admit to driving and using their cell phones at night.

Insurance Institute for Highway Safety

30%

admit to using their device while driving in snow or wet weather.

Distracted Driver Handbook

In the U.S. each year, **600,000** crashes are attributed to distracted driving, resulting in

330,000

injuries

and

3,000

deaths.

Harvard Center for Risk Analysis



What SMBs Want from Their Accountant – Have You Asked?



Doug Sleeter is the founder of The Sleeter Group, a national group of accounting software consultants who serve small and medium-sized businesses. He is the host of the Accounting Solutions Conference and the author of several books including the QuickBooks Consultant's Reference Guide, and the leading market college textbooks "QuickBooks Fundamentals and QuickBooks Complete." For more information, call 888-484-5484 or visit www.sleeter.com. Doug can also be reached at Doug.Sleeter@CPAPracticeAdvisor.com.

A study entitled, "The Future of Employment: How Susceptible are Jobs to Computerization?" released in September 2013 by the Oxford Martin School suggests there's a 94 percent probability that automation will result in job losses among auditors and accountants over the next two decades. Of course, the study's conclusion assumes accountants won't change anything about the services they provide or their business model.

I'm on a mission to help accountants beat the odds. To do that, accountants must change the way they serve their clients and begin making those changes today. Without dramatic changes, traditional accounting firms risk a dwindling client base and increasing irrelevance in the eyes of the small and medium-sized business (SMBs) they serve.

If your firm's business model is based on traditional compliance

services, you should ask yourself these questions. Do you want to sell your practice when you retire? Do you want to pass on your firm to your family or other partners? If so, now is the time to set your firm on a path that will meet the new demands that are emerging as technology shifts.

We're in the middle of a fundamental shift – from client-centric accounting, where clients do their own bookkeeping and then send the

records (often full of errors) to the tax preparer once a year – to an accountant-centric model, where accountants use cloud-based tools to provide accounting services as well as higher level consulting services. This shift is forcing the profession to reexamine the whole model of the practice.

In today's economic environment, SMB owners desperately need the services of a CPA. However, the types of services they need have

changed. SMBs no longer simply require tax and compliance-related services. They need – and *want* – advisory services. But wait, who says they want these services? Have you ever really asked your clients what they want from you?

The Sleeter Group recently updated our annual *What SMBs Want from Their CPA* survey. Survey participants were asked a series of questions to identify important trends in what services they want and how they want to work with their accountant.

Overall, the research shows there's a disparity between what businesses *want* from their CPA and what they *think* their CPA can or wants to provide, especially in the areas of business planning, strategy and technology consulting.

Specialize for Success

There's no doubt that specialization is becoming highly desirable by clients, if not required. The reason this makes sense is that if you're to provide deeper levels of services and become more involved in your clients' business processes, you'll need to understand the unique issues specific to their business.

In the survey, we asked business owners if it's important that their accountant be a specialist in their industry. The 2013 survey indicated that 53 percent said they require or prefer it, but that number increased to 62 percent in the 2014 survey.

Agility Trumps Ability

Although specialization allows accountants to focus on fewer markets, success in the coming years demands that you be flexible and agile with regard to learning and using new tools. It's almost impossible to use the same tools for all of your clients. You'll need to work with many tools and be willing to learn and use new tools as they're developed. More than ever, in order to be successful, accountants will need to invest heavily in continuing education in general, but especially in technology.

By staying informed and also educating clients on the benefits of technology, accountants are showing the leadership that clients really need.

This reinforces the view of the relationship as a “partnership,” which, according to survey results, is something SMBs want. Clients want to think of their accountant as an invaluable resource of knowledge and expertise who can help them grow their business.

Technology Services

The survey also revealed there's a general misperception among SMBs about what services their accountant is able and willing to provide. Businesses don't generally think of asking their CPAs for advice about technology. Perhaps they don't believe their accountant *wants* to provide these services, and/or they don't think their accountant *can* provide technology consulting services.

This is a serious blind spot. But who is blind? The client for not knowing, or the accountant for not communicating that he or she provides these types of services? I conclude from the research that there is a communication breakdown between traditional accounting firms and their clients. Perhaps because accountants are too busy working yesterday's business model (compliance services) instead of diving deeper with each client to become their partner in success.

How up-to-date is your firm when it comes to adopting the latest technologies, such as paperless and online solutions? When we asked survey participants how knowledgeable they believe their accountant to be about technology, 53 percent said their accountant is “current and uses up-to-date technology,” and 17 percent said their CPA is “behind the technology curve.” Only 13 percent believe their accountant is “ahead of the curve and an early adopter of new technologies.”

It's clear from the survey that SMBs want leadership from their CPA when it comes to technology:

- Forty-five percent of participants who currently engage a CPA said they require (or at least prefer) an accountant who is proactive in helping them plan and implement technology changes.
- Fifty-five percent of respondents who currently engage a CPA said they want technology recommendations from

their accountant.

Unfortunately, 76 percent of respondents said their accountant isn't proactive in helping them plan and implement technology changes. Clearly, this must change.

The Evolution from “Client-Centric” to “Accountant-Centric”

The PC revolution resulted in software solutions that were what I call “client-centric.” These systems put the client in control of all the technology and data they used to run their business.

The problem this caused the accounting profession was that it put distance between the accountant and the data the accountant needed to perform his or her services. And, of course, most of that client-entered data needed extensive cleanup before accountants could produce financial statements or tax returns. Perhaps even more importantly, these client-centric, desktop software products haven't been able to provide businesses with an easy way to do business, including on the Internet with the surge of SMBs involved in ecommerce.

The bottom line is that client-centric, desktop accounting systems just can't deliver. Today, virtually all innovation in the accounting and small business process arena can be categorized as being collaborative, or accountant-centric; that is, accountants want to take advantage of new innovations in technology, such as cloud accounting; anytime, anywhere access to client data; and the power of social media.

The New World for Accounting Professionals

In the new paradigm, you will purchase and use software solutions that help deliver services to your clients. By reimagining your business model and reengineering your business practices to leverage new technologies and tools, you can create not only a great business today, but a sustainable business for the future.

Advisory services are the Holy Grail for accountants. While compliance is necessary, advisory services are what SMBs truly want and need

from their accountants.

For accountants who stick to financial statement and tax preparation services, the dramatic improvements in technology will continue to commoditize those services. For example, within the last eight years, the concept of accounting firms providing payroll tax services – including preparing tax returns – has all but gone away. How much longer will it be before other tax and compliance services are automated to similar levels?

Opportunity for Accountants to Differentiate

Since more than 50 percent of SMBs want help with technology and only 25 percent of accountants are providing it, this indicates a huge opportunity for accountants to differentiate.

If you want to position your practice for growth, here's a checklist for how you can get there:

- If you're mainly in the compliance-services business, move toward higher value-added services, such as strategic business consulting, strategic technology planning, tax planning, and collaborative accounting services, where both accountant and client can access live data.
- Educate your staff on new-world technologies and adopt a set of recommended products for your clients.
- Agility trumps ability. Don't rely on one (or just a few) solutions. Each client may require that you collaborate with him or her using different tools. You don't want to lose clients because you “don't know” their systems.
- Develop skills to connect systems together from multiple technology vendors.

About the Survey:

The combination of The Sleeter Group's 20 years of qualitative research with the two years of quantitative research data leads to some interesting findings in how accountants work with their clients and how SMBs *want* to work with their CPAs. The results paint a picture of significant opportunities for forward-thinking accounting firms that invest in technology skills and build client services to leverage these skills. ●

6 TIPS for Managing Underperforming Staff

Sandra Wiley

You may have heard it before, or you may have actually uttered these words, “Why did we wait so long to let an underperforming employee go?” In some firms today it may actually be called the underperforming epidemic or the underperformer drag, but no matter what words you are using to describe the problem, the results are the same - our firm suffers when the leaders do not take action.

The other word that I hear when talking about employees who are just doing “okay” is that they may not be overachieving, but they are probably average. I have been attending Strategic Coach (an entrepreneurial coaching think-tank) for many years and one of the concepts that we hear is “average is where the worst of the best meets the best of the worst”. That does not sound like the kind of firm you really want to build does it?

In this article we are going to focus on managing the underperformer. Results from a recent Career Builder survey involving more than 2,000 US employees revealed that 27 percent of bosses “have a current direct report they would like to see leave their company.”

Many of you are either in this category or you know another leader in your firm who feels this way. Please think about those situations where there is a person in the firm that you really would be okay about if they left for another opportunity. Now ask yourself, how are we managing them today?

- **We point out their shortcomings** in blunt little comments that we hope they catch so that we don't really have to have a conversation with them. Really, has this ever worked to turn around a person's performance? Very unlikely.
- **We reduce their job responsibilities**, which much of the time means that they get to do less for the same pay and transfers a higher workload to our super stars. Think about where the reward is happening in this scenario. Your underachiever is winning and your top talent is being punished.
- **Fire them.** That can work, but sometimes this is shortsighted because we may have overlooked a way to manage them and make them better, so we lost a person when if we had simply worked with them in a different way they could have been amazing. You will never know.
- **Do nothing.** Sadly this is the most common thing that is being done right now. Ignore it and the issues might “right themselves” or maybe the person will just go away. Again, not likely. Rather than trying one of the

strategies above, let's discover the strategies that will work for you, the underperformer, and, ultimately, the firm.

1 **Daily Communication.** This does not mean that you must have a face-to-face, hour-long meeting daily. An email, an instant message or a quick stop in their office are imperative to help connect the underperformer to the job requirements. These communications should be all about their performance not just personal issues.

2 **Train your Supervisors** – and get training yourself. Growing your knowledge and your team's knowledge is critical to helping everyone in the firm. Teaching can come from books, web seminars, conferences, internal training and coaching. Your excuse cannot be, “There are no resources or opportunities.” The only excuse you could possibly give is “I don't want to” and that is not how a true leader thinks.

3 **Coach, Counsel and Mentor.** Ensure that you are coaching individuals to improve in-the-moment performance issues; counsel to correct personal or outside-the-professional-guidelines issues; mentor to ensure long-term professional goals within the firm are met. These are all parts of helping the underperformer improve his or her career to achieve a higher level of success. Identifying and showing support by correcting is imperative to the underperformers' ability to feel like they are important to the firm and the firm leaders.

4 **Tie their job to the overall firm goals.** All employees like to feel like what they're doing is important. They want to know that they are making a difference. The more you can

tie what they are doing to the overall strategies of the firm, the more likely you will be to turn their performance around. This will not be as easy as it sounds. Enlisting their help in this is important. The other thing that may have to happen is you will need to watch them do the work as you talk through their responsibilities, and then have them do the work and watch them again!

5 **Teach them** – don't just say “No.” We have a habit of saying no automatically when our team members – especially the less experienced – come up with new ideas or ask questions. It is sometimes blatant and sometimes a little more subtle, but the message is sent with a megaphone to the team members, “Don't ask questions, just do your work.” That is a killer to star performers and underperformers alike. There is a pretty easy fix in theory – stop, listen, allow! Stop what you are doing. Listen to the idea. Allow yourself to ask questions and clarify before you decide to move forward, get more information or stop the idea.

6 **Write It All Down.** Make sure you capture all of the communications and work that you do with the underperformer. If the worst case scenario happens and you must terminate, you will want all of your hard work recorded.

Identify your underperformer and don't allow “drag” for one more day! Follow the steps above and work hard to change their results. However, if you don't see the improvements you want, don't be afraid to make the hard decision to let the person find other opportunities that will fit them better. ●

Sandra Wiley is a Shareholder & COO of Boomer Consulting, Inc.

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5 Tips for Using Technology as a Strategic Asset

Is your firm leveraging technology as a strategic asset or is it viewed as simply a cost of doing business? Successful firms view it as an asset and build an IT leadership and governance model that helps harness the power of technology as an accelerator toward improved performance, profitability and growth. There are five aspects of IT governance that are differentiating the best from the rest.

1 ALIGNMENT

The AICPA defines IT Governance as *A framework that ensures that technology decisions are made in support of the business goals and objectives*. In other words, it ensures that you have alignment between the firm's strategic vision

and the technology initiatives that support the desired results. Simple enough, right?

Unfortunately, too many firms have no plan for the firm or technology. And many that do are still developing each plan in isolation and then wondering why there is no alignment. The better approach is to start with development of the strategic plan for the overall firm (preferably in collaboration with IT) and then develop a Technology plan that rolls up to and supports the firm's strategic objectives. This is how you gain alignment and avoid disjointed strategies.

2 IT PROFESSIONAL DEVELOPMENT

Trends such as the cloud and Consumerization of IT are changing the role of the IT Professionals and their skills will also need to adapt. This requires a different approach to professional development for your IT team. The focus needs to more on management, leadership and communication rather than obtaining technology certifications. These skills will better position IT to understand how people do their work and facilitate the identification and implementation of tools that will make their work easier and more efficient.

3 IT PLANNING & BUDGETING

To truly create alignment between firm strategy and IT strategy, it needs to be a collaborative effort between IT and business professionals. But it doesn't stop there. You need to ensure that all functional areas – IT, HR, Marketing and Talent Development are also in alignment with each other and the overall firm strategy.

Budgeting is a necessary evil that is dreaded by most IT leaders. They are presenting to a group that crunches number for a living and often get beat up in the process. Some tips that will make this process go a lot smoother for everyone include:

- **Speak in their terms** – Develop your presentation in business language rather than technology terms.
- **Limit the detail** – Start with the important numbers such as IT spend as a percent of revenue and percent change from last year and provide the detail as requested.
- **Separate maintenance from innovation** – Maintenance items keep the lights on whereas innovation is about new projects that will move the firm forward. Separating the two streamlines the discussion.

4 TECHNOLOGY COMMITTEES

Once you've set your technology strategy, it's time to execute. A common mistake is to label most (if not all) of the strategic initiatives as IT projects rather than firm projects. Most successful firms facilitate the collaboration through a technology steering committee that should:

- Be responsible for plan execution
- Have balanced representation from service areas and levels within the firm
- Utilize task forces

- Realize that the IT Department is not the same as the Technology Committee
- Include other functional leads from the firm (Marketing, Training & Learning, etc.)
- Focus your committee meetings on progress rather than perfection.
- Highlight accomplishments and use challenges as learning opportunities rather than an opportunity to point blame.

5 PEER GROUPS

With the speed of change today in technology and all areas of business, it is impossible to keep up with the leading trends when you operate in a vacuum. It's imperative that firms step outside their own four walls and learn from their peers. Many firms are doing this today but their approach is actually creating further disconnect between IT and business because everyone does their own thing. IT professionals go to technology conferences/training and firm leadership attends practice management events. The topics may be similar or even the same, but often times they are not hearing and taking away the same message. Bringing the IT and business leaders together in the same room will start to bridge the gap between IT and practice management.

Technology impacts every area of the firm, and managing the people, planning and processes around IT is critical to the success of your firm. Waiting can be costly since playing catch-up requires a lot more time, effort and money than maintaining your technology at a high level. I encourage you to start today by taking the initial steps to improving your firm's performance through improved IT leadership and governance. ●



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.



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