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The greatest single challenge for firms in workflow is dealing with data – gathering, synthesizing, manipulating and formatting it for workpapers. The data collection and analysis phase of preparing tax returns can represent anywhere from 30-60% of a given tax return engagement, so this also represents one the biggest opportunities for efficiency improvement.

To what extent have you and your practice/company embraced cloud computing?

At Thomson Reuters ONESOURCE, nearly all of our tax compliance and workflow solutions are available on the web as a cloud-based offering. Cloud computing allows for flexible access, reliable security, disaster recovery and tremendous cost savings for a firm that truly embraces this model. Software services such as ours represent the future of the entire professional services industry.

In what ways have you contributed to your firm/company to make it a better place?

Having an entrepreneurial background, I'm constantly looking for ways to improve our business – whether that's with products, services, user experience, etc. That style of leadership has really served me and our business well. My business segment was going through a flat period when I took this role – we're now growing by double digits. This has opened the doors for my direct reports to take on more responsibility and make an impact themselves. That ability to impact changes the way people work and, ultimately, what we can accomplish.

I've led a number of initiatives to change the way we think and the way our development teams work together across our business. This spirit is palpable throughout the team; we've seen a tremendous improvement in employee morale. We've been able to shift our culture to one of growth, creativity and innovation, where we accept the risk of failure because we don't accept complacency.

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What major changes do you foresee in the accounting profession of the near future (3-5 years)?

I definitely think we'll see even more adoption of SaaS and automation solutions to streamline the tax return process. We'll see tax professionals getting more savvy in technology, and compliance and workflow software that's more intelligent and integrated. With more pressure from tax authorities and more global reporting requirements, data management solutions will be recognized as critical to the profession.

How do you see yourself participating in shaping the future of the accounting profession?

I'll continue to drive the development of technology that can dramatically improve the end to end tax process, from data collection to client delivery. My mission is to help firms improve efficiency (i.e. take minutes/hours out of the process) and enhance client service delivery.

What is your career philosophy?

Work hard, play hard.

Not including your current employer, what company do you most admire and why?

I would have to say Apple because of its ability to transform itself. A company that was once 90 days from bankruptcy, Apple reinvented itself and continues to change the game with its innovative consumer products. While I have always been a Microsoft and PC fan, I have become infatuated with Apple's products, including AppleTV and iPhone – and most recently the iPad. This company started with an

inferior market position and was still able to transform, innovate and create new

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domains/subjects/disciplines – it's so motivating. He inspires loyalty from anyone who gets the chance to work with him. I would not be where I am today without this individual.

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Technology

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