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The greatest challenge in workflow for The Green Abacus has been building a Customer Accounting Services workflow from the ground up. Most CPA firms have been tax or audit focused in the past, with accounting being a lower level service with not much attention to workflow or how that service impacts your customers. When I started, I had to relearn the fundamentals of accounting. It's so much more than year end journal entries to prep a trial balance for tax preparation. And the accounting-specific software available is not made for these services. I like Podio, because it's approach to workflow building didn't try to box me into traditional services.

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

My workforce is fully virtual, serving customers across the country. I've assembled a team of both employees and strategic partners to bring the best minds from around the country to our customers.

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

Besides founding the company, this past year I spent time with a coach and a graphic designer (and a pen and notepad) to come up with the business model and culture that really reflected the company I wanted to present to the world, that The Green Abacus is a team of superheroes called to unite around other superheroes to accomplish great things. It reflects a collaborative view that takes each members gifts into account for the mission ahead. No teammember is unnecessary, we all have powers that will be called upon depending on the mission. My first priority is building a company where geekiness is encouraged and work and play are indistinguishable. By focusing my attention on my team, they're able to focus their attention on our customers.

In what ways do you participate in either the professional community or your

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future (3-5 years)?

I hope to lose some of the competitive advantage that I've gained through technology and culture as these things become more commonplace throughout the profession. The move towards basic accounting functions as a value add is already happening, so I see more firms niching as a way to set themselves apart. And attracting talent will be much more difficult as teammembers start to expect capabilities like working from anywhere. As more firms move in this direction, leaders will need to continue to push forward into new and interesting innovations for the benefit of our customers.

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

I hope to be a part of it, as much as I'm able. By modeling a successful culture and niche-approach to fellow CPAs, I will challenge and encourage them to build the same and stop putting everything on hold until after the next tax season. And through my work with the MACPA, I will continue to push towards what is best for the small business owner customers of our profession (such as reporting standards that actually make sense).

What is your career philosophy?

I am not diminished by giving what I know away. Why hoard? If I share my knowledge with others, the bar raises challenging me toward more knowledge, and the world overall gains. This is how I've most been able to enable the success of others, by developing and freely sharing the ideas I encounter.

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

One of the first companies I started adoring was Zappos, after reading Tony Hsieh's

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started interacting with the group, I was still employed. They coached (and comforted) me through my very difficult first years (starting my company in 2012 with two toddlers at home, zero customers and a small emergency fund). I've made my own mistakes, but the successes I've made at the speed I've made them are largely attributable to learning from the mistakes the other CPAs in Thriveal made and shared along my path.

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Technology

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