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There is no doubt that as we have grown both in staff and clients that the need for good workflow is critical. Efficient workflow is essential in delivering the highest level of service to our clients. I'd say the challenge has been the fact that our business is not "cookie cutter", meaning our clients are all unique and have different needs. Because of this, one workflow design doesn't fit all, but that's why we have been successful. We provide firm-specific solutions.

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

We not only embrace it, our entire business is built upon it. Simplified Innovations is a Cloud Computing company, enabling CPA firms to move their entire firm into our CPAcloud™. We are passionate about the opportunities CPAs have available to them by moving to our cloud. We are excited to have a daily impact on our clients' abilities to leverage technology.

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

I co-founded the company in 2008 and have had a role in every strategic decision from new hires to investments in technology. It is our goal to provide an awesome place to work and provide the highest level of service to our clients.

In what ways do you participate in either the professional community or your local community to help others?

I have always been a collaborator and enjoy keeping up to date with colleagues, clients and prospective clients so that we as a company can stay ahead of trends and position ourselves to always provide the absolute best solutions. I am active in the AICPA, MACPA and Industry knowledge groups like Boomer. On a personal level, I am involved with my kids' activities and participate in community events they are involved in.

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

We are very forward-thinking firm and we stay ahead of trends to bring them to our clients first. I am involved in a number of associations and committees where I can get a sense of what firms are doing across the country. Simplified Innovations services _ clients in _ states, including Alaska. I feel that gives us an edge and insight into developing solutions that are at the forefront of innovation.

What is your career philosophy?

Kick-ass, take names and make more money than I need.

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

It's not necessarily a company, but he owns many companies.... Marc Cuban. Marc is an innovator who refuses to let the status quo dictate his decisions. Marc challenges conventional thinking and finds ways to flip turn things into gold. Everything from buying a losing NBA Franchise and turning it into a coveted organization to Broadcast.com which pioneered online media streaming.

Describe one person who has been an important mentor to you and how that person helped change your life.

F. Carter Heim, CPA of HeimLantz, PC in Annapolis has been a very important mentor in my life. I started working for him right out of college where he immediately got me involved with the Maryland Association of CPA's. in addition to getting me involved there he taught me how to deliver value to clients and go beyond just "crunching the numbers." Ultimately, he also gave me the opportunity to explore and learn about technology in CPA firms, which was the spark that led to my

decision to transition from being a traditional CPA to a technology service provider

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Technology

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