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What are the key areas of your firm that have seen the greatest change/challenge in workflow over the past few years? (Or, what are the key challenges you see firms facing?)

Having a streamlined project management system has been an issue for me this past

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this strength. We've had to turn away some work because of this, but I know that my clients now and those we get in the future will appreciate that we are one of the only firms in the country that has made this step. And, we are one of a few firms in the country that have the depth of knowledge of QuickBooks Online and the supporting apps that we have.

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

All of my team members are virtual and we all have a very flexible schedule. While I do look at hours from time to time, I am more concerned about tasks getting done by their deadlines and with the quality I expect to deliver to our clients. We are about taking individual responsibility for our actions and clients, while also relying on each other to ask questions to and bounce ideas off of one another.

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

Last year, I started a weekly tweet chat for QuickBooks Online users. It is an hour long chat on twitter every Thursday at 3PM Eastern/12PM Pacific. I am so proud of the community that has grown from this chat. We have a lot of accountants and developers that specialize in QuickBooks Online. Our topics have also grown outside of just the nuts and bolts of QuickBooks Online. We chat about business management, have spotlights of different apps, and also keep everyone up to date on the new updates to QuickBooks Online.

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

I believe more and more professionals will be using cloud solutions in their practices.

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I want to change the way CPAs look at bookkeeping. In most public accounting firms, they see QuickBooks and Bookkeeping as a means to an end – the tax return. But, I see these numbers a way to help advise clients and be able to support them in ways that most accountants haven't before. So many large corporations have controllers, CFOs, and other management accountants shaping the business and helping other executives understand the numbers. I want to do the same, but for the small business owner.

### **What is your career philosophy?**

It is OK to be different. For most of my career, I have been on the leading edge of technology. When I got out of school, I was trying to convince all of the partners of the firm I was with to join LinkedIn. Some did it and others just ignored me. Now there are consultants that can help you setup a profile! I feel like the same thing is happening with QuickBooks Online and all things Cloud. I'm one of the first that has embraced all this technology and I love it. I'm also one of the first that is trying to bring management reporting to small businesses. I can see what these things can do for our profession and I just want to be a part of that path. It doesn't make me any better or worse than other CPAs. It just makes me different and that is OK.

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

Intuit does an amazing job at what they do – and that is deliver some of the best accounting, personal finance and tax products out there. I admire the drive of almost every employee I interact with there and I know that that comes from great management. Everyone cares about the user and they go beyond functionality and design – they strive to delight their users. I admire that goal and have tried to do the same for my clients.

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She has helped me cut out the gray in my business. Sometimes I get wrapped up in things that aren't working and get depressed about it. But, Stacy has helped me see that business can be black and white and it is OK to make tough decisions to make your business better. She has also helped me with my insecurities about being young, different and outspoken in this profession. I am very thankful for her advice and support this past year.

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Technology

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