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Challenges Facing Us

The greatest change in workflow over the last few years has been to be as paperless as possible. While we have a good handle on it within our firm, changing client behaviors has been difficult. We would like to have our clients more accepting of receiving and sending information electronically.

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

We are pretty much all cloud based. Using a SaaS-based suite of products for our tax practice, including our paperless filing system, started our journey into the cloud. We then implemented a portal system to park final products for clients to have easy access to when needed or communicate securely with us. In addition, we have also implemented Office365, so our Excel, Word, Outlook, Messenger, etc, are now cloud based. Currently, we have started moving our clients accounting systems to the cloud, as well so they may have anywhere, anytime access, and we may do the same on our end.

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

Over the years, I have worked hard to implement systems that make working at my firm more relaxed and enjoyable while at the same time providing tools to enable work to get done more quickly. We also don't live and breathe by the timesheet anymore which makes everyone happier.

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

Professionally, I volunteer for a lot of accounting technology programs, I help mentor young CPAs (who I also learn a lot from), have written a blog, and given

interviews on the profession for various types of media. Locally, however, most of my

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and Chairman Emerita, Marshall University Lewis College of Business Accounting and Legal Environment Advisory Board, American Cancer Society Relay for Life, and America in Bloom, among many other community and fundraising events.

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

The accounting firm is constantly changing. Right now, I see a change in work environment. Technology has enabled us to become more connected and more mobile. This allows us to not only hire staff that do not have a physical presence, but also gives us the ability to have clients that are not in our geographical regions, while at the same time being able to work schedules that are not within the 8-5 philosophy. While this may be more difficult for large firms to grasp, the small firms of the future are able to adapt the technology quicker and make changes resulting in a more comfortable and flexible place to be for both the employees and the clients.

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

I'm a major supporter of great technology and enjoying my career. I step outside of the boundaries of the traditional green-visor CPA roles to help others see the benefits of changing to embrace technology. Now, not only do we need to understand accounting and tax, but accounting technology advisory services and implementation are a growing segment of what we do. I plan to continue to be an early adopter and speak about the right solutions for clients urging other CPAs to continue to grow their knowledge.

What is your career philosophy?

My career philosophy is to work hard at what I love to do, how I love to do it, and with the people I want to do it with. It may sound cliché, but life is too short not to

enjoy your career or to let negative people impact your life. Let bad clients go and

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which I am able to give, but what they don't know is that I am in awe of their desire to launch a business and work so hard in this very complicated business environment that we have. Some of my clients are brilliant and some are crazy lucky. But I admire each one of them so much for stepping outside of their comfort zones and making dreams happen, not only for them, but for employees, as well.

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

Within the accounting industry, there have been so many amazing people from which I have learned. My past firms have taught me so much. And, I'm grateful for the exceptional people I meet at conferences who stay in touch and let me pick their brains regularly. However, my father, a recovering CPA, is my greatest mentor. He's taught me not only about the profession, business, and how to succeed at being a successful firm, but he's also taught me about life, community involvement, and how being a wonderful, thoughtful person provides positive results for everyone including yourself. It's not ALL about making money. It's about doing the best job you can, embracing your clients like family, providing services in your community for which you will never get paid, and always doing things for the right reasons. My firm and my desire to see myself and my clients succeed and grow are a result of the values and lessons he has taught me.

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