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To the Cloud or Not to the Cloud, That Was the Question

I recently returned from the Sage conference in Washington, D.C., where I spent a great deal of time with thought leaders Ron Baker and Ed Kless. Each of us led sessions focused on improving firm operations. Collectively, Ron, Ed and I helped firms think through the many aspects of running a successful business. For example, Ron discussed the need to abandon traditional hourly billing and move to a value pricing model (visit Ron's website at verasage.com). Ed led an afternoon discussion on the value of Cloud technologies, while I guided attendees through my Next Generation Accounting Firm workshop. It was a lot of great information, and at the core of each speaker's session was a need to explore the Cloud.

Nearly every conference I've attended over the past year or two, and more articles than I can count, have focused on the topic of the Cloud — pushing the profession toward advanced, web-based technologies. During my Next Generation Accounting Firm session, one attendee, who had been quiet the entire day, stood up and asked me a question that really made me think. He asked, "Why is it that every conference I go to and so many articles tell me that I must move my firm to the Cloud? Can you help me understand this?"

To answer his question, I took off my Executive Editor and consultant hats and put myself in his shoes. As the managing partner of my own accounting firm, I've asked myself this same question several times. As I thought more about how to answer the question, I recalled the years I spent as a student and follower of Stephen Covey's, "The Seven Habits of Highly Effective People." I recalled Habit 2: *Begin with the end in mind,* which advocates looking ahead and envisioning what you want to accomplish. For me, that meant determining what I wanted my firm to become. So I answered the attendee's question with another question: "What is it you want to accomplish as a firm that you are not accomplishing now?"

This core question then led to several others: Do you want your staff to be able to access data and documents 24/7 from anywhere? Do you want your clients to have anytime/anywhere access to their information via secure, convenient portals? Do you want to heighten data security by eliminating document exchange via email (and moving to portals)? Would you like to support your clients' accounting needs in real-time as opposed to working with backed up files?

> "TO THE CLOUD OR NOT TO THE CLOUD?" DOES NOT HAVE A SIMPLE *YES* OR *NO* ANSWER.

I explained that in order to accomplish all these items, the Cloud was necessary — yet it doesn't have to be an "all in" situation. The Cloud may be only part of the answer. It's important to truly look at all aspects of firm operations, identify where improvements are needed and decide, ultimately, where you want to take your firm. Once a proper analysis is done, the answer may be a change in staff, updating processes and procedures, and/or implementing cloud-based technologies.

The point here is to acknowledge that the Cloud isn't necessarily the be-all and end-all for firms. I firmly believe the Cloud is a critical component of a firm's larger system, but they must first put the time into evaluating their current infrastructure and then identify all areas in need of improvement.

"To the Cloud or not to the Cloud?" does not have a simple *Yes* or *No* answer. What it comes down to is staying informed and current on what is taking place in your own firm, as well as staying apprised of new technology developments. Keeping up with both will better position firm leaders to implement the right technologies as needed … whether that's the Cloud or not the Cloud. ●

M. Darren Root, CPA.CITP
Executive Editor

Darren is the Executive Editor of CPA Practice Advisor. He remains in public practice as the principal of Root & Associates, LLC, in Bloomington, Indiana, and is president of his consulting practice, RootWorks. He formerly served on the Board of the AICPA's CITP Credentials Committee and is a former member of the Board of Directors for the Indiana CPA Society. He speaks at dozens of professional organizations each year and frequently serves as a guest lecturer at Indiana University's Kelley School of Business.

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1 - 2 - 3!!

1 **ON YOUR MARK**
Download a free QR Code Reader app (such as i-nigma QR Code or Qrafter).

2 **GET SET**
Open the QR Code Reader and look for the tags in this issue (pages 2, 23, 39 & 44). Here's a sample that will let you connect with us on Facebook.

3 **SCAN A TAG**
Hold your smartphone's camera over a tag and – voila! – you'll be on your way!

CONTENTS

ON THE WEB

GOING BY THE NUMBERS YOUR BUSINESS CAN GROW HEALTHY.

> We grew from 12 to 23 employees. We don't just want to grow, we want to grow healthy. I met with my broker and she cleared up a lot of questions. The conversation led to UnitedHealthcare. They use data and information to help individuals make more informed decisions that may lead to better health. I like that. I also like the power of straightforward answers. Like "yes," I can provide my people with benefits. I understand numbers. In particular ones that may improve my bottom line. With so many medical plans to choose from, I can provide my people with coverage. There are even plans for vision, dental, life and disability.
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Building a Firm for the Next Generation

This year, I celebrated my 50th birthday … and it was quite a turning point. It made me stop and reflect on my career and the vast changes I've observed and experienced professionally and personally. During this period of reflection, I was overcome with a powerful drive to change the public's perception of the tax and accounting profession. Media across the board does a great job of perpetuating the image of the traditional accountant as a boring, nerdy number cruncher in a bad suit. That simply isn't the case. They know it; I know it; and I hope you know it, too. We are tech-savvy, creative and working to build firms that support an environment of positive thinking, inventiveness and next-generation allure.

I grew up in the accounting profession. My father opened his own small firm when I was three years old, and only recently, at the age of 83, did he officially retire. Having turned 50, that means I've been a part of the profession, whether as an observer or active participant, for nearly five decades. In all this time, if there is one thing I've learned, it's that accountants are some of the hardest working professionals I know. And today, they are also evolving as some of the coolest and most creative.

The Elements of a Next Generation Accounting Firm

I started my accounting career at Deloitte Haskins & Sells. A few years into my career, I decided to go off on my own and launch an accounting practice. From the start, I never had the desire to operate a traditional firm, based on the standard model within the profession. I wanted something different, something new. A firm that, looking forward, my kids would be proud to work in and, at some point,

take over.

With my kids now grown, my wife and I are soon to be empty nesters. The day is also coming that my children may join me in running Root & Associates. My oldest son is finishing up his bachelor's degree in accounting at Indiana University (IU), and my daughter, already having obtained her undergraduate degree in accounting, is now wrapping up her MBA at IU. For the past 15 years, I've focused on building a business that my children would want to be a part of someday. The goals I set for myself were lofty, but obtainable. I wanted to run a firm that:

- **Enabled a good life-work balance**
- **Allowed me to work on my terms**
- **Supported a professional yet comfortable environment**
- **Allowed me to earn what I needed to earn**
- **Harnessed the power of technology**
- **Provided a feeling of satisfaction among all staff**
- **Attracted long-term, loyal clients**

> BY BUILDING OUR BUSINESSES RIGHT TODAY, WE ARE SECURING THE FUTURE OF THE NEXT GENERATION OF ACCOUNTING PROFESSIONALS.

The more firm leaders I meet in my travels, the more I see that many want the same things. And more and more, I'm witnessing professionals putting in the work to change their firms into something spectacular — a place where people want to work, where clients are with you for the long haul, and where they just feel good about what they've built.

I firmly believe that accounting is one

of the best, if not *the* best, professions … which is why I feel so strongly about building a firm that is structured for the next generation of professionals. Here's my mantra: *By building our businesses right today, we are securing the future of the next generation of accounting professionals.*

Life-work balance, a happy staff, loyal clients, increased profits — these are all obtainable goals, but require work to achieve. Those building next-generation firms have a solid grasp on niche strategies, advanced technologies, workflow and branding. The following are the components required of a next-generation-ready firm:

- **A clearly defined niche strategy,** enabling firms to specialize and become experts within certain niches, and ultimately serve the type(s) of client they want to serve.
- **A masterfully developed internal workflow system,** offering a model that supports ease of communication and a streamlined, paperless workflow for both staff and clients. This includes the following elements:
  - *Online client accounting* to support real-time collaboration and ensure that you are always working with current data. (NO MORE BACKUPS!)
  - *Client portals* for real-time delivery of documents, tax returns, financial statements, payroll journals, and more.
  - *A professionally branded, tech-advanced website* that embodies the personality of the firm and offers a dedicated place to conduct business with clients. Your website should not be a static online brochure. It *is* the new front door to your firm.
- **A sound, thoughtful branding** strategy, allowing firms to always put their best foot forward. Every interaction (email,

letter, outdoor signage, interior office, business card, invoice, website, etc.) should represent a strong, professional brand image. We live in a service-oriented, brand-savvy society, and if the purchasing habits of clients and prospects are anything like mine, then they are buying based on the feeling they get when they see or interact with your firm. Make sure that feeling is a positive one!

The Next Generation of Accounting Professionals

So is it possible to build a firm that encompasses all of these elements and achieves the laundry list of goals outlined? Absolutely! Is it easy? Absolutely not. It takes work and perseverance … and an ongoing commitment throughout the life of your business. However, it does get easier over time. Once the machine is built, it's simply a matter of maintaining.

Professionals are out there doing it with great success. They are building firms that operate at maximum efficiency, emit a powerful brand presence, and are attracting the younger generation of professionals. One such practitioner, Jason Blumer, CPA.CITP, has become of friend of mine and has just written his first column for this issue. Jason is younger than me by about 10 years, but we have many similarities. Jason's father practiced before him, so he too grew up in the business. He also has a burning desire to make the profession a place where young professionals want to work — and earn the *props* it so deserves. Jason is quirky, cool and runs his practice on his own terms.

After getting to know Jason and maintaining a steady watch on the younger generation of accountants getting ready to enter the profession, I've realized that we aren't all that different. The notion of Gen X, Y and Millennials being vastly different from the Boomer generation, in my mind, is not even close to the truth. In the end, we all want the same things: a great place to work, security, a balance between our personal and professional lives, the flexibility to work remotely, and the opportunity to build solid

By M. Darren Root, CPA.CITP, Executive Editor

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relationships with clients and our communities.

To prove my hypothesis, I sat down with Jason (a Gen X'er) and my 23-year-old accounting-bound daughter, Meredith Root (a Millennial), to explore their perceptions of the profession and what they are looking to achieve.

The Interviews

Darren: *So guys, what was it like growing up in the accounting profession?*

Meredith: I gained unique insight that definitely shaped the way I view the profession and my personal goals within it. I learned there is more to it than the stereotypical accountant and a daunting tax season — like becoming an advisor to clients, maintaining a brand and staying current on technology. I feel lucky to have grown up in the profession.

Meredith Root

Having this inside knowledge better prepares me for what to expect and how to resolve issues before I enter.

Jason: I thought accountants were geeks when I was growing up. My dad was an accountant, and my exposure to the profession left me thinking it was pretty boring. I was a creative guy — playing in rock bands, doing stand up in elementary school (which got me sent out in the hall), and excelling in art in high school. Then, halfway through college,

Darren: *What was it that enticed you to get an accounting degree and to consider the profession?*

Meredith: I always said I wouldn't go into accounting … until I started college. In my first semester at IU, I had to take an accounting course and realized two things: I was good at it, and I actually enjoyed it. I didn't mind studying for my accounting classes because I found them interesting, and the more interested I became the more I found myself asking questions about my dad's firm.

Jason: It came about by default. I was getting married six days after I graduated from college, so I knew I needed something that would pay the bills. I figured I could "pretend" to be interested in accounting to meet the needs of my family. Nothing profound here. As it turned out, I didn't have to pretend. I run my practice my way; and that's why I love what I do.

Darren: *What do you think needs to change within the profession in order to get young people excited about owning or working in a firm?*

Meredith: I see two major factors that make my generation hesitant about working in a small firm. First, most have little to no exposure to the small firm. In school, we are mainly exposed to the Big 4 and regional firms. Second, work/life balance is a perceived issue. My generation grew up with busy parents, and that is something we would like to change.

Jason: They need to be informed that this profession is one of the most creative, and it can be a career that has great

clients. Young professionals need current thought leaders to debunk the myths that the profession is old, geeky and works in a uniform manner. They need to understand that this profession is ever changing; that technology allows us to become global knowledge workers; and that you can make your firm look the way you want.

Darren: *How important is branding to you and being part of a quality brand?*

Meredith: Branding is huge to me. In a world with so many choices, we tend to buy based on what we know about a brand or how a brand makes us feel. This is a topic that is pushed quite a bit in school, and one my dad takes very seriously in his firm. The fact is that most prospects don't know what makes an accountant "good," which is why the firm has to deliver that message through a strong brand.

Jason: Positioning and branding is everything to any profession. Ours is no exception. The "unspoken" brand in our profession of polished shoes, the white starched shirt and a purple paisley tie is slowly dying (thankfully). Small business owners are younger and are open to new service providers. The more we brand our firm as "on the edgy fringe," the more we seem to identify with today's SMB clients. In fact, revenue increases seem to be directly proportional to the number of tattoos and mohawks in our office. Clients want something different. Any branding strategy should include serious differentiation. Anything else is just a sea of sameness.

Darren: *If you could create the firm of your dreams, what would it look like?*

Meredith: My ideal firm is innovative and consistently utilizing leading technology. My firm's website would be a primary resource for clients to communicate and where transactions are exchanged in real time via portals. I would have a lean staff to keep my small firm agile, while being well positioned for growth through the use of efficient processes and technology. Ideally, the processes within my firm would be streamlined and intuitive so the firm could run without me being there, which would also enable me to spend ample time with family.

Jason: No office, no paper, no phone

and no shoes.

Darren: *What have you learned from your father that has shaped your ideas about a career in accounting?*

Meredith: One of the most important things I learned from my dad is that if you love what you do and you are passionate about your career, it doesn't feel like work.

Jason: My father was a hard worker. I learned my work ethic from him. Those who are unwilling or don't have the time to commit to the hard work of running a firm should NOT go down this road. It's no easy road (though it does freakin' rock). I also learned that running your own firm is a commitment that must be made by your

Jason Blumer

entire family, including those treasured vacations away from the office as well as those times that you are working around the clock.

Darren: *What's the single most important thing you want out of an accounting career?*

Meredith: Fulfillment. I am an ambitious person who likes to be challenged on a regular basis with a desire to continue learning. I think the accounting profession satisfies both of these needs.

Jason: The most important thing to me is the ability to be a change agent for clients who put their total trust in the firm and me. I want to change lives, and a career in public accounting allows you to do that more than any other profession. I never thought I would say that, but now I know it's true. It's exciting to live in this space. Public accountants are the bomb!

We are All in This Together

I don't know about you, but what I get from these responses is a lot of common goals and aspirations across generations. So if we are all working toward similar goals, it makes sense that firms need to give appropriate attention to building a firm of next-generation status in order to compete effectively and attract the most qualified of candidates getting ready to enter the profession. ●

IN THE END, WE ALL WANT THE SAME THINGS: A GREAT PLACE TO WORK, SECURITY, A BALANCE BETWEEN OUR PERSONAL AND PROFESSIONAL LIVES, THE FLEXIBILITY TO WORK REMOTELY, AND THE OPPORTUNITY TO BUILD SOLID RELATIONSHIPS WITH CLIENTS AND OUR COMMUNITIES.

I realized I had to pick a major. Because my dad was an accountant, I picked that major by default. I figured I would be "geek boy" by day and "creative boy" by night. As it turned out, I get to be creative all the time.

impact on so many people. Being part of the accounting profession has profoundly impacted me, my clients and my staff. There is now an openness to change that allows for creativity in how we operate our businesses and serve our

Marketing Takes Center Stage

No longer the ugly stepsister to sales, one progressive firm spotlights the value of a well-conditioned marketing program

For too long, marketing has lurked in the shadows, ignored and rejected. The traditional thought is that marketing is a non-billable activity, and therefore a non-necessity. In reality, marketing *drives* sales. Well-planned and consistent promotion of services not only keeps a sales funnel full, it helps firms build a strong brand and stay in front of prospects and clients.

The firm of Simons Bitzer & Associates gets this … completely. And, man, can that ugly stepsister perform. Encore!

A Refreshing Change in Mindset

When Raegan Potter, Business Development and Marketing Specialist at Simons Bitzer & Associates interviewed for her position, she recalled being delightfully surprised at the principals' view on marketing.

"I was braced to hear what I've heard numerous times: Marketing is a *nice-to-have*, not a *need-to-have*," Potter stated. "Their positive outlook on marketing was refreshing."

Principals Greg Simons, CPA and Barb Bitzer, CPA are dedicated proponents of marketing and branding. They not only understand the effects of a strong program, but also the value of communicating consistently and frequently. Staying in front of an audience year round is the key to bringing in new business and maintaining existing clientele.

"When I hired in, the economy was exceptionally bad," Potter recalled. "Yet Greg and Barb were dedicated to implementing a comprehensive marketing program. They really understood the importance of ongoing business promotion and were willing to spend the dollars … even during an economically slow period."

The Test & Measure of a Good Marketing Program

Potter admits that the first year was a tough one. She not only had to get up to speed on the tax and accounting profession in general, but also dedicated a great deal of time evaluating the firm's current clientele and testing marketing efforts.

"One of the most effective ways to market is to understand who your ideal clients are," Potter explained. "My first directive was to evaluate the firm's existing pool of clients in order to identify the type(s) of prospects we wanted to go after. I primarily looked at revenue and industry to pinpoint ideal target markets."

Once Potter knew the "who" (audience), she was in a better position to develop the firm's message. From there, she concentrated on testing and measuring campaigns for effectiveness.

"You can't just sit down and write a marketing plan for the entire year," Potter stated. "You have to implement a program a little at a time, pausing to measure and test elements."

Not every marketing initiative is going to be a huge hit. That's why it's critical to test campaigns and measure success along the way. Thorough

Principals Barb Bitzer, CPA and Greg Simons, CPA

analysis is the best way to identify what is working and what needs to be 86'd.

"A lot of firms would view the analysis part of marketing as non-billable, and therefore not needed. The principals are huge proponents of measuring campaigns. In fact, they insist on it," Potter said.

During the first year, Potter closely monitored activity in all areas, including email campaigns, the firm's newsletter, networking events, and direct mail. Along with the principals, she reviewed key performance indicators such as:

- Click-thru rates — what items did recipients click to view?
- Open rates — was the communication opened at all?
- Forwards — what initiatives did recipients forward on?
- Social forwards — what items did recipients forward via social media channels (i.e., Twitter, Facebook, LinkedIn)?

From this data, Potter was able to

WELL-PLANNED AND CONSISTENT PROMOTION OF SERVICES NOT ONLY KEEPS A SALES FUNNEL FULL, IT HELPS FIRMS BUILD A STRONG BRAND AND STAY IN FRONT OF PROSPECTS AND CLIENTS.

WE ARE PASSIONATE ABOUT YOUR Success

Principal Greg Simons, CPA and Business Development & Marketing Specialist Raegan Potter

"WE HAVE MANY ELEMENTS THAT MAKE UP OUR PROGRAM — FROM SCHEDULED NETWORKING EVENTS AND HOSTED EDUCATIONAL WORKSHOPS TO MONTHLY EMAIL CAMPAIGNS AND DIRECT MARKETING INITIATIVES. THE FIRM'S CORE SERVICES [CFO AND CONTROLLERSHIP] ARE YEAR-ROUND OFFERINGS THAT REQUIRE ONGOING MARKETING."

better separate the popular campaigns from the laggards. Data also provided valuable marketing intelligence such as what day of the week yielded better results (Tuesdays and Thursdays tend to be best; just before a holiday tends to be bad) and what content/messages resonated with target audiences.

"You can't know what direction to take if you don't know where you are," Potter stated. "By measuring campaigns, you can better determine your next move. Randomly sending out marketing campaigns without proper analysis will leave you spinning your wheels."

Choreographing Multiple Initiatives

Marketing is diverse … with many channels and initiatives from which to choose. The key is to create a program that is well choreographed — one where initiatives complement one another and flow. On the marketing stage, there's a big difference between fluid dance and a lot of jumping around.

Through vigilant testing and a fair share of trial and error, Potter has developed a strong marketing plan.

"We have many elements that make up our program — from scheduled networking events and hosted educational workshops to monthly email campaigns and direct marketing initiatives," Potter explained. "The firm's core services [CFO and controllership] are year-round offerings that require ongoing marketing."

Potter offered a few examples of the firm's marketing initiatives:
- **Regular email campaign blasts**
- **Monthly eNewsletter (distributed to prospects, clients and referral sources)**
- **Direct mail campaigns to target markets**
- **Networking events, including local Chambers of Commerce**
- **Complimentary workshops on a variety of business topics**
- **Speaking engagements for community agencies**
- **Social media program, which includes LinkedIn, Twitter, Facebook and a firm blog**
- **Referral program network**

"Over time, you just learn what elements work and when to launch them," Potter said. "That's when you know you have a good program in place."

Put Yourself Out There

Marketing has a place in every firm, no matter the size. To keep sales funnels full and a steady stream of new (and ideal) prospects flowing through the door, firm leaders need to rethink outdated notions that marketing is merely a "nice to have." A sound program keeps a firm in front of clients and prospects, consistently strengthening brand image and attracting the right demographic.

So pull marketing out from the shadows and get that ugly stepsister dancing. Before you know it, you might just find that your brand presence has reached super star status. ●

Kristy Short, Ed.D

Kristy is a partner in RootWorks Communications (RootWorks.com) and president of SAS Communications 360 (SAScommunications360.com) — firms dedicated to providing practice management education, branding, marketing, and public relations services to the accounting profession. She is also a professor of English and marketing at University of Phoenix and Cleary University. You can reach her at kristy.short@cpapracticeadvisor.com.

Our Differences

We are recognized for our honest and direct approach as we realize the importance of our role in our customers' businesses and financial plans. We strive to serve the needs of each of our customers with the utmost professionalism and forthright communication, building relationships not just associations. The nature of our work demands just that. As trusted advisors, we work closely with our customers to help them improve their business performance. Our customers appreciate our team's approach and willingness to roll up our sleeves and work beside them on every level of project development and execution. As a RAN ONE accounting firm, we are members of the largest independent network of accountants in the world. This offers our clients the added support of a large global network with the focused business-sized service of an independent, local firm.

Our Unique Process

At Simons Bitzer & Associates, we take a unique and specific approach to all the services we provide whether it's an entire strategic business process or a business tax planning project. Our approach consists of four important steps: Strategize, Plan, Implement and Monitor ("SPIM")™. Using this approach, we are able to ensure that the services provided are precisely as intended with the results achieved in a timely manner and according to plan. We also monitor the progress to determine the success of each action taken.

This approach is designed to improve the processes and profitability of a business. At Simons Bitzer, we're passionate about your success.

If you'd like us to consider sharing your firm's story of innovation in a future issue, go to www.CPAPracticeAdvisor.com/great-practices and complete the short form. We'd love to hear from you.

5 Hardware Tools that Mean Business For Small Businesses

Even with all the talk about the productivity-boosting effects of going to the cloud … and SaaS this, and web-based that, technology hardware remains an essential component of any modern business. Yet, while the obvious core components of desktops, laptops, monitors, printers and even phones may immediately come to many people's minds when they hear the term *hardware*, there are many specialty gadgets that can help businesses maximize their mobile mojo, empower their productivity, energize their efficiency and boost their bottom line.

MOBILE MONITOR TECHNOLOGIES — FIELD MONITOR PRO
www.mmt2.com

Many professionals have gotten used to the advantages of multiple monitors

Isaac M. O'Bannon,
Technology Editor

Isaac is the Technology Editor for CPA Practice Advisor, having joined the publication in September 2002. Through his experience in the areas of consumer and professional-level software and peripherals, as well as knowledge of the public accounting field, he provides reviews of technologies used by accountants and their business clients as well as contributing a regular column that provides helpful information that ranges from improving search techniques, when to upgrade a computer and computing security issues.

on their desktops. Whether two, three or even more, research shows that multiple monitors help increase productivity. For professionals whose work often takes them on the road, having to even temporarily work from a single (smaller) monitor can be more than an inconvenience; it can actually cause a decrease in efficiency. Lugging around an extra monitor isn't an option, though. Or is it?

The **Field Monitor Pro** was created for accountants and designed to be mobile-friendly and easily portable. It includes a pivoting base that looks like a notebook PC but actually offers a full-size 10-key, a USB video connector, extra USB connections and a compact, built-in stand that allows for landscape or portrait configuration. For on-the-go professionals who often find themselves in the netherworld of single-screen, cramped-keyboard purgatory, especially auditors in the field, the Field Monitor Pro offers a well-deserved reprieve. The 15.4-inch monitors cost $289, can work with PCs and Macs, weigh only four pounds, and easily fit alongside laptops in travel bags.

FUJITSU — SCANSNAP S1100
http://scanners.fcpa.fujitsu.com/scansnap11/s1100.html

For professional accountants, scanning documents has become an essential component of the concepts of the paperless office and optimized workflow, and many firms have successfully implemented scanning processes into the front end of most of their engagements. When workers are mobile, they can even take the convenient and very portable **ScanSnap S1100** with them. The smallest, fully featured scanner on the market, the S1100 offers optical character recognition to create searchable and interactive PDFs, and to pull information from documents and business cards. It then synchs that data into Outlook and other contact management systems. The pocket-sized S1100 (11"x2" and only 12 ounces) offers continuous feed detection, full-color scanning and a 7.5 second scan speed. It costs $199 and can be used with Macs or PCs.

NOVATEL WIRELESS — MiFi
www.novatelwireless.com/mifi

Even in an age when almost everything is web-enabled, not everything has built-in connectivity, which means you still may need a wireless network to use or have full internet access with your laptop, iPad or other Wi-Fi capable devices. That's fine when you're around the office or in an urban setting where there's always a network to be found, but when you're in the middle of nowhere on a road trip with colleagues, friends or family, that just isn't an option, and adding 3G/4G packages to each of those items can get pricey.

That's where the **MiFi** can be an essential tool that lets you share a personal wireless hotspot with up to five devices, with a range of up to 30 feet. Smaller than an iPhone, the MiFi works like a mobile USB broadband card, with a four-hour active use battery life and up to 40 hours when on standby. The MiFi also offers a memory card slot that allows it to hold up to 32GB of data. The MiFi is offered by the major wireless providers, ranging in price from as low as $50 with a two-year plan.

SQUARE INC. — SQUARE CREDIT CARD READER
www.squareup.com

For service-based companies, mobile workers can present a challenge when it comes to accepting the preferred manner of payment these days: credit and debit cards. Unfortunately, many small businesses think of credit card processing and merchant account services as difficult and expensive. The good news is, it's neither.

With a simple gadget-and-app combination called Square, all the business owner or staff member has to do is swipe a customer's card and enter in some pricing and cardholder details. The transaction is instantly processed, and the funds are transferred into the business' bank account. Simply create an account on Square's secure servers and attach the quarter-sized swipe card reader to an iPhone, iPad or Android device. Pricing for the system is based on use, with each transaction processed by swipe having a 2.7% fee. If credit card numbers are entered manually, the charge is 3.5% plus 15 cents per transaction. The swipe card reader gadget and the app are free, and there are no setup or management fees.

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FUJITSU

MOBILE TECHNOLOGY:

A look at today's landscape and how these tools can help you better serve clients

Do you ever feel confined and limited by your office walls? Do you find that a different environment can sometimes change your perspective? How many times have you found yourself wishing you could be in multiple places at once? The virtual professional is a growing segment, especially in the tax and accounting field, and solid vendors in this space have responded to the needs of these professionals with exceptional tools. Mobile practitioners can now manage their practice, access data and interact with clients from anywhere

Traditional desktop applications, which were once limited to access only by way of terminal servers and remote desktop programs, can be delivered and accessed without having a traditional desktop or laptop computer. Many applications are now available as Software as a Service (SaaS) solutions, which are generally accessible through a browser and an internet connection, although even the vendors define SaaS in different ways. These same applications have miniaturized versions that provide access to key features for professionals while they are away from their physical desktops.

CCH, a Wolters Kluwer business (CCH), Thomson Reuters, and Intuit ProLine provide SaaS products that enhance mobility, collaboration and integration. The CCH ProSystem *fx* SaaS Suite is a suite of tools (Tax, Document, Portal, Practice and Workstream) vital to a firm's operation, and can host the data locally, in a secure data center, or some combination of these. Thomson Reuters Tax & Accounting offers many cloud solutions, including GoSystem RS Tax, GoFileRoom and Virtual Office CS. Virtual Office CS is a hosted web portal

> **TRADITIONAL DESKTOP APPLICATIONS CAN BE DELIVERED AND ACCESSED WITHOUT HAVING A TRADITIONAL DESKTOP OR LAPTOP COMPUTER.**

with the traditional, locally installed CS Professional Suite applications hosted on secure servers. Intuit has a number of browser-based solutions, which include ProLine Tax Online and a forthcoming ProLine Practice Management application.

Research tools are available on the go with CCH's IC Mobile application and the Thomson Reuters Checkpoint iPad application. Intuit and Thomson Reuters have QuickBooks Mobile and Mobile CS, respectively, which extend the reach of popular applications into the on-the-go space. Mobile CS from Thomson Reuters provides access to firm, staff, client and research tools. Users can enter time and expenses, receipts, mileage, and tasks in real time. They can even connect with other professionals in the ARNE Community.

Companies like Capital Confirmation, Inc. have revolutionized the process of audit confirmation requests with an electronic process. The company's Confirmation.com works to reduce the time exhausted preparing, mailing, requesting and processing audit confirmation documents. The recently launched mobile application provides firms with status updates on confirmations through the iPhone or iPod Touch. And there are other mobile tools, as well.

So how does a firm get mobile? The infrastructure necessary for accessing information includes an internet connection and a mobile device. You've probably heard the various terms like Wi-Fi, Mi-Fi, 3G and 4G, which refer to methods in which people gain access to the internet. Public Wi-Fi generally refers to hot spots and an unsecure connection, and you should take caution when connecting through an unsecured point. This type of connection can be compared to a party line, where multiple people could easily access your network and files. A better solution for mobile Wi-Fi users is a portable internet access point called a Mi-Fi, which allows the user to setup a private or secure hot spot, allowing a limited number of users to access Wi-Fi enabled internet devices using a secure connection to the internet over the cellular network.

Mobile devices are flocking the market in the form of smartphones and tablets. Platforms include BlackBerry, Android, and iOS products such as the iPhone, iPod Touch or iPad, to name a few. When selecting devices and applications, it is important to consider platforms and integration. Some applications are device-specific, such as only being available for Mac and iOS products. Others only function on the Windows, Android or Windows Phone platforms.

While many firm applications offer the ability to save and export documents as PDF files, there are still times when paper needs to be transformed into digital format. Vendors like Fujitsu and Canon offer a wide range of scanning devices compatible with multiple platforms. In fact, Fujitsu's ScanSnap S1100 Color Mobile Scanner tucks away into almost any bag and is ideal for on-the-go professionals who need to scan receipts, contracts, plastic cards and more. The scanner offers instant ability to scan items as PDFs and Microsoft Word and Excel documents, or into popular cloud applications like Evernote and Google Docs.

CONTINUED FROM PAGE 12

Other essential mobile tools enable practitioners to be more effective in helping clients analyze their financial data. Many SaaS and mobile products function as collaborative tools, where the accountant and client can simultaneously work with transactions and data in a SaaS application, despite the long distances between the two parties. These tools provide users with the benefits of scalability and flexibility, as well as the ability to monitor and control how each user works with the product. Clients who are overwhelmed by the many features within their software products are able to utilize mobile apps built and tailored specifically to their job functions, without fear of interfering with other areas of the system.

SaaS-based product Bill.com continues to improve its application to be device indiscriminate. Bill.com Mobile allows Android, iOS and BlackBerry users to pay and approve bills, as well as view outstanding and overdue invoices with its new Receivables module. The mobile application allows users to send invoices and payment reminders from any device, and the notes feature fosters ongoing communication between senders and recipients.

Xero.com, a web-based financial accounting system, has also extended its SaaS solution to the mobile platform, giving partners instant access to the partner dashboard with the opportunity to troubleshoot or analyze data from any device. Users are able to view bank and credit card account balances, prepare and issue invoices, and snap a photo of a receipt to prepare expense reports instantaneously (see image 1).

Image 1

Concur Breeze, an easy-to-use online employee expense management tool, makes it possible for users to create, update, approve and pay expense reports using any Apple iOS or Google

WE SHOULD ALL EVALUATE HOW WE CAN USE MOBILE TECHNOLOGY TO BETTER SERVE CLIENTS AND PROVIDE OURSELVES AND OUR EMPLOYEES A BETTER QUALITY OF LIFE WITHOUT SACRIFICING PRODUCTIVITY.

Android phone. As with Xero, receipts can be downloaded from your financial institution or scanned with your mobile device's built-in camera. The information captured on the mobile application is automatically updated in the Concur website. There is no need to tape down and scan pages of thermal receipts, enter them into Excel, and then have another employee type them into your accounting software. With the Concur mobile app, the data is keyed in once, imported directly into accounting software, and can be filed in Breeze or exported to the company's digital document management system as a PDF file.

Recent improvements to the Intuit Partner Platform (IPP) bring a more heavily populated Intuit App Center, which is a marketplace for third-party, on-demand add-ins for the popular QuickBooks small business accounting software. Business owners can find apps that work with QuickBooks and satisfy extended needs in their business beyond financial tasks provided in the accounting software. The Center provides a wide range of SaaS applications that extend QuickBooks to meet specialized needs such as expense reporting, e-Commerce, time tracking, cash flow management and marketing.

Another vendor in the SaaS accounting space is Intacct, which offers an accounting suite designed for medium-sized and public companies, as well as an accountant edition for tax and accounting firms. The Intacct financial management and accounting system provides a modularized suite of products to cover time

and expenses, purchasing, inventory, revenue, project management, as well as the core general ledger. Mobile apps such as ExpenseCloud, eliminate the manual entering of expenses for reporting and immediately import credit card transactions, receipt images and clients directly into Intacct.

NetSuite also offers a robust line of SaaS-based accounting solutions to the mid-market, with Accounting/ERP, CRM, Inventory and Ecommerce applications. With the introduction of SuiteCloud, developers are able to create applications that provide additional mobile flexibility. And SuiteApp.com is a marketplace for exploring additional tools built for industry-specific needs.

Developments in the payment industry have brought additional payment options to small business owners who are on the go. Square and Intuit GoPayment streamline credit card processing from smartphones or the iPad. Charlie Russell, founder of CCRSoftware, offers a detailed look at Intuit GoPayment on the iPad2, which is worth investigating (see image 2).

Dwolla takes the paperless concept one step further, offering the ability to pay vendors or accept payments utilizing electronic transfers (neither cash nor credit cards are required). Users can quickly identify merchants that accept Dwolla using the vendor's Spots feature.

Image 2

If you're not quite ready to fully immerse yourself or your firm in mobile and SaaS solutions, you're in good company. Many firms find that they still need access to features that reside in their desktop products. Companies like CPAASP/Insynq, Right Networks,

Awensa and Cloud9 Real Time are helping to bridge the gap that exists between desktop, SaaS and mobile applications. These companies host almost any computer application in a secure server farm. One hosting provider, Insynq, offers the ability to host more than 300 applications, including tax preparation software, financial accounting software and even Microsoft Office.

Vendors in the mobile tax and accounting marketplace realize that security is a concern for everyone. You will want to ask questions and review documentation and third-party reports to become comfortable with each vendor's approach to security and business continuity. Some areas for evaluation include data center operations (SAS 70/SSAE 16 reports and compliance), industry-specific compliance requirements (e.g. HIPAA, GLB, IRC §7216), safeguards that prevent Denial of Service (DoS) attacks, the physical security of the servers, backup systems, support and response times.

The introduction of apps for smartphones, hosting platforms and SaaS solutions has changed the way we think about where we want to work. This revolution, combined with the general availability of reasonably priced hardware, powerful software and always-on connectivity everywhere means that today's users will not accept the business processes of a generation ago. We should all evaluate how we can use mobile technology to better serve clients and provide ourselves and our employees a better quality of life without sacrificing productivity. ●

By Kara Haas, CPA.CITP, CFE

Kara owns her own firm and is dedicated to the growth and success of small business, individuals and community organizations. Her firm's core focus is the retail industry and online solutions, offering a solid mix of accounting knowledge and technology to assist businesses in reaching their goals. Kara has worked in manufacturing and family business for several years developing a passion for accounting. She is a member of the Florida Institute of CPAs and the AICPA.

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Switching Software for Better Client Service

A standard consulting practice rule is that switching software is expensive. Disruptions to procedures occur, retraining is required, and without careful analysis you may force your organization into a product that has less capability or is more difficult to use. We expect clients to switch software as frequently as they switch physicians or religions. The benefits of switching software products can be extraordinary when you understand your business needs and pick a good solution. The disruption can be monumental when a poor solution fit is selected. Unfortunately, there are times we can't avoid switching, such as when a product is discontinued or when a company ceases to exist.

Switching software has occurred more often this year (and for the right reasons) than we have seen in the last 25+ years. It may be time for you to take your organization in a new direction or to a whole new level … or not. Most tax and accounting firms want to take a "safe" approach and do what they've seen others already doing. It's the innovators who will often take a calculated and thoughtful risk, and choose a new or different way to complete their tasks.

Safety

We respect and have recommended for some time the strategy of choosing your core products from a single vendor. For some firms, that typically means large publishers that have all of the products that are needed for efficiently and effectively running a practice: tax, audit, practice management, document management, portals, and so on. In the United States, companies like CCH, Thomson Reuters and Intuit have been building or acquiring products in order to offer a full portfolio. You may want to use solutions from a single publisher with a full portfolio or you may prefer to follow a best of breed approach, choosing solutions from many different suppliers. The advantages of dealing with large publishers include integration, support services, training, best practices, planning, innovation and vision. But the greatest advantage may be the safety of dealing with a known entity.

> EMBRACING CHANGE WILL PUT A CHARGE INTO YOUR LIFE AND WILL CONVINCE YOU THAT WHAT YOU ARE DOING IS IMPORTANT AND VITAL TO YOUR CLIENTS.

In other sections of this issue, you will see reviews and coverage on payroll and client write-up. CCH, Thomson Reuters, Intuit, Sage, AccountantsWorld, CYMA, Open Systems and other publishers offer products in these categories. And as you look at the products reviewed, your comfort level may drop as you see smaller or less well known publishers, even though they may have a superior product or sufficient financial strength. I know and trust all of the publishers named above.

Risk

When you stay on an existing solution, you have known costs, limitations, capabilities and comfort. When you switch software, you have to manage through product claims, facts, selection, change management, different costs, dismissing prior suppliers, culture change, retraining and a myriad of other factors. The smaller your organization, the easier this can be. Conversely, the larger the organization, the harder it may be to convey the benefits and strategy, and spread the cultural change among the team. It can also be challenging to manage the training and converting of everyone's thinking to the new way of doing things.

To manage the risk, you should select and test carefully. Pick only a few people within the organization and a few clients to prove the concept. For example, if you intend to switch clients from ADP or Paychex to an in-house payroll offering from Intuit or Thomson Reuters, then you must be sure that all of the capabilities needed for your clients are included. Further, you should have thought through how marketing, profitability, and client acquisition and retention improve by offering this new service in-house. Since firms have outsourced payroll for so many years, most practitioners believe they don't want to deal with the hassle or responsibility of payroll. Others have thought again about recurring revenue and increased profitability by client that includes services beyond compliance.

Accounting Software, Payroll & Write-up Are a Start

The AICPA is projecting that the amount of simple tax preparation work will decrease over the next five to 10 years because of more automation, and that audit work will be done by fewer firms. Since small firms often have 80% or more of their revenue from tax, and larger firms frequently have splits of 40% tax and 40% audit, these compliance services need to be augmented by new offerings. When you assist business owners with making money and helping them run their businesses more effectively, the conversations change from the "must dos" of compliance, to the "wouldn't it be great if…" of business advisory services.

For most accounting firms, offering services that involve accounting software, payroll and write-up is the start of becoming a stronger business advisor. These products allow you to build a monthly recurring revenue business that your clients are excited about, and that you can be excited about, too. Large publishers like CCH, Thomson Reuters, Intuit and Sage can help you get there. So can smaller publishers like AccountantsWorld, Intacct, Open Systems, CYMA or Xero … if they fit your client's needs. You will be able to expand the offerings with more capabilities in business analytics, niche specialty advice, wealth management and other specialty offerings.

Managing Change

One of the biggest challenges you have as an owner or a manager, or perhaps just as an individual person, is managing change. This topic has been widely covered in many books and articles. My encouragement to you is to embrace change. Work with those around you to get through changes in your technology and firm as easily as possible. Embracing change will put a charge into your life and will convince you that what you are doing is important and vital to your clients. And isn't that why you entered the profession in the first place? ●

Randy Johnston

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He is a nationally recognized educator, consultant and writer with over 30 years' experience. He can be contacted at randy.johnston@cpapracticeadvisor.com.

5 Outlook Email Tips to Improve Productivity

If you are like most accountants, email has become one of the primary tools utilized to communicate with clients, internal firm personnel and external resources on business matters. While there are a variety of email systems available, most of the major accounting application vendors have integrated their products with Microsoft Office, which includes Outlook as their email client, making it the most prevalent tool we see utilized in accounting firms today. So it is important that firms become as proficient as possible with this tool. Below is an outline of five Outlook tips that have made us more effective in our practice.

I Minimize Interruptions

The default for most email users is to notify the recipient whenever a new email arrives, which can include an audio signal as well as a visual queue. When this occurs, the user's focus is pulled from what they are working on down to the toolbar where they must decide if that email must be responded to immediately, which, the vast majority of the time, is not necessary. During this brief interruption, focus is lost and the user must back track to where they were before the interruption and get back to work. These interruptions can be almost continuous, making it very difficult to effectively concentrate on the task at hand all the way through to completion. The solution to minimize these interruptions is to eliminate the visual and audio queues or to delay them for whatever time period the user feels is tolerable (usually 30 minutes or longer). To eliminate the notification within Outlook 2007, go to the Tools/Options/Preferences Tab > Email Options > Advanced Email Options, where you can "un-check" the boxes for what to do when new items arrive in your inbox. If you are waiting for a specific email to arrive or want to send an email immediately, you can hit the Send/Receive All button or F9. This

process has allowed us to focus on projects through completion, and we now only Send/Receive emails on demand, as needed. To delay delivery, users can set the time they want by going to Outlook's Send/Receive tab > Send/Receive Settings > Send/Receive Groups, where the default refresh time can be set for "All accounts." If you work on larger projects, you can set the default to 60 minutes or longer.

II Organize by Rules & Colors

A good percentage of the emails we receive can be grouped together to be addressed at a later time. By using Outlook Rules, they can be automatically routed to a specific folder so they can be accumulated until the user has time to access them. For example, many of us receive certain email newsletters or blogs that we want to read at our leisure but don't want to be interrupted with as soon as they arrive. A "Reading" folder can be setup within Outlook 2007 under the New tab > Folder. When an email arrives that you want to have automatically routed to the Reading folder, Right-Click on that email and select "Create Rule" by checking the boxes that state whenever you receive an email from that sender it should be routed automatically to the folder you have selected. Whenever a new email is routed to a folder, it makes that folder appear in Bold so you know there are unread items. These settings can also be done in the Tools > Organize tab, where they also have a feature to change the color of inbound emails for specific senders. For example, all emails from a specific client or friends and family members are differentiated by a selected color so they stand out from other emails.

III Reduce Email Volume More Effectively

We all know the amount of junk mail out there, and using hosted remailer services like Postini, AppRiver and McAfee/MxLogic or spam filtering programs will clear out most offending spam emails before they hit your inbox. For those emails that clear the gauntlet but are still junk mail, you should right click on them and tag them as junk mail so they will be routed that way in the future. The other component of reducing volume is considering who to respond to and how. When an email is sent to a group of users but the response only has to go to one person, train your staff to respond only to that recipient instead of "Reply to All." It's also unnecessary to reply to everyone with acknowledgements like "me too" or "I agree," unless there is a specific query (i.e., voting or survey).

IV Touch It Once

Another key is to set aside periods throughout the day where you can effectively focus on email and clear communications. This takes a lot of discipline, and staff must be trained to quickly decide whether to handle it, assign it, delete it or plan for it. If the email can be responded to quickly and completely, you should just handle it instead of hoping to spend more time on it later and then forgetting about it. If this requires that the information be saved in an engagement binder or archived in some way, it should be done immediately. If the email and/or attachment can be delegated to someone else, you should assign it with input into how the requirements of the email can be addressed. Some emails are only informational in nature, and if no action is required such messages should just be deleted. Finally, for those emails that require additional thought and planning, you should determine whether a task should be created or time scheduled on the calendar. By dragging the email either to the calendar or task pane, a specific item will be setup and reminders included so that the item gets the proper attention of the recipient.

V Consolidate Communications

Most of us carry a smartphone that can access email as well as our workstation. And over the next year, we anticipate most partners and managers will also carry a tablet device that can access Outlook. To optimize access to communications, firms should look at consolidating all communications into Outlook, including fax and voicemail, which is referred to as unified messaging. Digital fax solutions deliver inbound faxes as an attachment to email, which can be sent directly to each person with dedicated fax numbers or to a single administrative person who would update the subject line and forward the fax to the appropriate recipient. Today's phone systems can also create an audio file of a voicemail that is emailed to the recipient (which is also referred to as computer telephony integration). By having ALL communications in Outlook, you will only have to go to one place to manage them, and it can be accessed with the widest variety of tools.

For the foreseeable future, Outlook will be the communications tool of choice for accounting firms so it is imperative that we do all we can to optimize its capabilities. With proper planning up front and ongoing training and reminders to firm personnel on features, Outlook can have a significant impact on firm productivity. ●

Roman H. Kepczyk, CPA.CITP

Roman H. Kepczyk, CPA.CITP is president of InfoTech Partners North America, Inc. and works exclusively with CPA firms to implement today's leading best practices and technologies. Roman authored "Quantum of Paperless, a Partner's Guide to Accounting Firm Optimization" which is available at Amazon.com.

Comfortable No More: 3 Things You Must Do Now

I can't help but preach the message that *change is coming* in our profession. That is my end goal in every professional thing I do. This type of confabulation may offend you or it may encourage you. But my goal is to take away your comfort as you lead your professional practice into the future. Avert your eyes! Look away from that tax return or audit, and seek to decipher the future that is taking us all over. For sure, the future will involve the traditional services you offer now, but it will involve so much more.

Are you ready? Change is coming.

I want to (1) bring clarity to the future of our profession, and then (2) lead the way towards change that will ultimately help us grow and become better change agents for our clients.

To be sure, there are things you are doing wrong … and it's time you heard about it. I have multiple coaches in my life that constantly tell me what is wrong with my practice management theories, and then seek to help me understand how to change. We all need this counsel. That is the kind of information you'll find in my monthly articles here at *CPA Practice Advisor*. And that is the kind of discussion you'll find in the professional network for accountants I formed, called the THRIVEal +CPA Network (more info at www.THRIVEal.com). So far, more than 100 accountants from around the world have joined the Network to learn, grow and change.

Comfortable No More

People, groups and countries begin a gradual and often unnoticed descent into decline when they become comfortable. As human beings, we always drift towards comfort. In fact, we need rest and comfort to recharge so we can begin again with renewed efforts to do our jobs, meet the needs of our families and serve mankind. But there comes a time when comfort can overtake us and take our eyes off of our ultimate goals. We've become too comfortable in the professional tax and accounting space. In fact, our profession is in a dangerous state of becoming irrelevant. I believe we are in decline, and that sucks.

This comfortable decline will hurt us as professionals, it will hurt our practices and it will hurt our clients. Treble damage. That really sucks.

I believe comfort is now doing damage to the profession. The leaders of our professional firms are comfortable for the most part. They may be ready to retire, ready to sell their firms or just ready to merge and end the pain of tax season. But what about the future of our profession? What are we doing for those who work in our firms, or those who are in university preparing for a life in public accounting? They need to hear this message: *The public practice of accounting can change the lives of the practitioner and those we serve.*

Here are three things we can do now to fight the perils of our current professional opulence:

1.

Get a freakin' coach. When you welcome the outside scrutiny that a coach can bring, you step into a world of discomfort. You can't keep people accountable. People *choose* to be held accountable. Until you become one who chooses to be held accountable, you won't be able to see the dysfunction in your firm. When you do a lot of little wrong things for a long time, you end up at the end of your career burned out, mediocre (at best) and with no firm valuable enough to sell. You have to have people looking inward to identify the problems you can't see. The problems are there … you just can't see them. Invest in a coach.

2.

Join a community of change agents. This is what the THRIVEal community is all about. We don't offer CPE for our time together, and we don't take tests. We get together to talk about our issues — how others have tackled these problems and help each other grow as professionals. As a Network, we are focused on four foundational tenets: Community, Collaboration, Technology and Innovation — ideas we need help with to grow as entrepreneurs. Hang out with change agents, and you'll become a change agent yourself.

3.

Set goals. Setting goals is all about overcoming fears. We don't set goals because of our fear of failing to achieve those goals. I have the same fears. But when you make goals, it intentionally averts your eyes from your present to your future. Those who look ahead are the ones who achieve great things. They fail to meet all of their goals, but they achieve a lot more than they could have had they not set those goals. Become paperless in 2011, stop accepting the wrong clients, serve one niche, get rid of your servers and stop offering non-valuable services. It will take years to achieve these goals, but you better hurry. Some firms have a jump on you. They are moving ahead and welcoming the changes in our profession.

Change is coming. Where will you be one year from now? Three years? Five years? It better not be where you are now. Change is a constant now. You've got two choices: Grow or leave the profession. What will you do? ●

> THE PUBLIC PRACTICE OF ACCOUNTING CAN CHANGE THE LIVES OF THE PRACTITIONER AND THOSE WE SERVE.

Jason Blumer, CPA.CITP

Jason M. Blumer, CPA.CITP, CFE, is managing shareholder of Blumer & Associates, CPAs, PC. He wears flip flops and jeans, says "dude" a lot, and often works in coffee shops with headphones blaring the latest Bloomberg podcasts (though he doesn't understand most of it). Jason loves new game-changing cloud technology and plays rock and roll too loud. His daily duties include consulting, process design, blogging, marketing and business development, innovative thinking, coaching, practice management, and acting as a change agent. Jason founded the THRIVEal +CPA Network to enhance and change the tax and accounting profession based on the foundational tenets of Community, Collaboration, Technology and Innovation.

Winning With Client Write-Up

Over the past several years, some accounting technologists have come close to announcing the demise of client write-up (or at least the significant decline in its necessity and profitability for professional accountants). Well, as Mark Twain would put it, the reports of the death of client write-up have been greatly exaggerated. In this year's review of professional write-up systems, we look at the capabilities and advantages of several web-based, hosted and locally installed programs.

Write-up continues to be a core service area for many firms, but it is definitely evolving. The nature of the service remains essential to many small businesses —produce financial statements and compilations for use by the business in forecasting and planning or to report results to company investors and creditors. What has changed, however, is how the professional accountant goes about collecting, reviewing and reporting on the business' data.

Prior to the nearly universal adaptation of small business bookkeeping systems, data collection often occurred via boxes of receipts, paper invoices and a check register. With client-side bookkeeping came new data collection methods: Business users were entering sales, payments, payroll and other information into their own computers, then transferring the data, often on disk, to the accountant. For more seasoned accounting professionals who endured this transition, it didn't necessarily result in significant time savings since it created the need for accountants to review transactions individually to ensure correct account postings and journal entries.

In 2011, the concept of data collection and correction has become more automated and easier for both the accountant and the business. Most transaction data files are now electronically transmitted between the client and the firm, often using portals or web-based accounting solutions that directly integrate the client data into the firm's professional accounting system. While this speeds delivery and return of the data, the process itself is still somewhat outdated.

> WELL, AS MARK TWAIN WOULD PUT IT, THE REPORTS OF THE DEATH OF CLIENT WRITE-UP HAVE BEEN GREATLY EXAGGERATED.

In addition to the on-premises installed programs that have been around for years, SaaS and hosted professional write-up systems are now available and enable better client interaction, with either batch-based synchronization or online simultaneous data access. With web-based and integrated client accounting tools, firms can now have full access to live client data 24/7. The accountant can work with the general ledger and journals, reclassify transactions, and perform bank reconciliations and other tasks, without scheduling a time to have exclusive access to the data file. Another advantage to this arrangement is enhanced client collaboration, which allows the accountant to respond instantly to client needs. SaaS systems also include communication tools, portals and document sharing options.

The Value Proposition
Some skeptics see a challenge in monetizing this new form of client write-up, especially if they traditionally bill by time or project. However, those who've transitioned to the "value pricing" approach have had success. The key is to stop thinking of write-up as a once-a-month service and instead consider it an ongoing service that is part of a larger client relationship "package" for which a business pays a set recurring fee over the course of a year.

Some professionals may consider it more of a consulting format, but it's still "write-up," and with the right tools, it can be both profitable and personally rewarding. Other notable benefits include helping to stabilize cash flow for the practice, distributing many work processes across each calendar month and year, prioritizing tasks, and facilitating the delegation of more of the work to junior staff who have lower hourly billing rates.

Clients also benefit from greater and more frequent interaction with their accountant because their books stay in better shape, which means the professional can provide more accurate financials, projections and cash flow estimates. This ongoing review makes it easier to perform other engagements such as payroll and tax compliance services since the quality of the data is enhanced by this ongoing, monthly work. Client write-up is far from dying; it's just rebranding itself as the client value relationship, and will be part of most successful accounting firms for the foreseeable future.

While reading the product review snapshots on the following pages, as well as the full product reviews on our website, please note the program features that are most important to the needs of your practice and your clients. ●

Isaac M. O'Bannon, Technology Editor

Micronetics, Int'l. — Accounting Xpert Enterprise Edition

2011 OVERALL RATING ★★★★☆

BEST FIT:
Firms managing small to mid-sized enterprises, and those with multiple locations.

STRENGTHS:
• Doesn't require monthly closings
• Run reports across multiple years, any time periods
• Broad reporting & financials customization
• Strong support for multi-location entities

POTENTIAL LIMITATIONS:
• No bank statement import function (although import is available from ASCII format)
• No client portals or automated data transfer

SUMMARY & PRICING
Accounting Xpert Enterprise Edition is a high-volume write-up tool designed by accounting professionals, and provides excellent control over journals and the GL. Its work screens simplify many often tedious tasks, and it provides solid financial statement generation and customization options. The fully networked version of the system costs $995 for the first user ($245 for each additional user), and includes data import/conversion support. System renewals, including unlimited support and updates, are $495 per year. The optional Checkbook Xpert module (for client data entry and synchronization) costs $195. The system is best-suited to firms managing small to mid-sized enterprises with flexibility to handle any type of business.

561-995-1477

PRODUCT DELIVERY METHODS:
☑ On-Premises
☐ SaaS
☐ Hosted by Vendor

micronetics International

★★★★☆ **BASIC SYSTEM FUNCTIONS**
★★★★☆ **CORE WRITE-UP FEATURES**
★★★★☆ **REPORTING & FINANCIAL STATEMENTS**
★★★★ **IMPORT/EXPORT/INTEGRATION**
★★★★☆ **HELP/SUPPORT SYSTEM**

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10314303

www.axpert.com

The Versatile Group — CertiflexDimension Client Write-Up

2011 OVERALL RATING ★★★★★

BEST FIT:
Firms managing clients with high transaction volumes and multi-level company structures.

STRENGTHS:
• Good interface customization
• Strong reporting & financials options
• Broad set of core modules
• Broad reporting & financials generation

POTENTIAL LIMITATIONS:
• Moderate reporting customization
• Module-based pricing

SUMMARY & PRICING
CertiflexDimension Write-Up and the related modules provide comprehensive write-up functionality and tools for streamlining journal tasks and reconciliation functions. The tool is well suited for use with large clients that have multi-level company structures … or with large firms. Pricing is modular and based on the number of users. The core System Manager is $295 for a single user, $895 for up to five users, and is required with all purchases. The first-year pricing for the Write-Up module is an additional $995. Renewals are $395 for each of the core modules.

800-237-8435

PRODUCT DELIVERY METHODS:
☑ On-Premises
☐ SaaS
☐ Hosted by Vendor

★★★★★ **BASIC SYSTEM FUNCTIONS**
★★★★★ **CORE WRITE-UP FEATURES**
★★★★★ **REPORTING & FINANCIAL STATEMENTS**
★★★★☆ **IMPORT/EXPORT/INTEGRATION**
★★★★☆ **HELP/SUPPORT SYSTEM**

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10314687

www.CertiflexDimension.com

CYMA Systems, Inc. — CYMA After-the-Fact

2011 OVERALL RATING ★★★★★

BEST FIT:
Professional firms managing complex clients with multiple locations or subsidiaries, as well as nonprofit and grant-based organizations.

STRENGTHS:
• Exceptional customization options
• Comprehensive module options with strong integration
• Output to many formats
• Broad reporting & financials generation

POTENTIAL LIMITATIONS:
• Module-based pricing
• No client portals

SUMMARY & PRICING
The CYMA After-the-Fact module and the other core modules in the CYMA Financial Management System are comprehensive and offer abundant tools for managing client write-up processes, from maintaining and correcting journal entries and transactions, to bank reconciliation and financial statement generation. Additional e-tools and solid customization options add to the power of the program, which is geared toward firms managing mid-sized and larger clients. A package with appropriate write-up focused modules would cost about $1,700 per year for a license supporting up to five concurrent users.

800-292-2962

PRODUCT DELIVERY METHODS:
☑ On-Premises
☐ SaaS
☐ Hosted by Vendor

CYMA Accounting Software

★★★★★ **BASIC SYSTEM FUNCTIONS**
★★★★★ **CORE WRITE-UP FEATURES**
★★★★★ **REPORTING & FINANCIAL STATEMENTS**
★★★★☆ **IMPORT/EXPORT/INTEGRATION**
★★★★★ **HELP/SUPPORT SYSTEM**

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10314684

www.cyma.com

Intuit, Inc. — QuickBooks Accountant 2011

2011 OVERALL RATING ★★★★½

BEST FIT:
Firms whose clients mostly use QuickBooks and who provide general write-up and reconciliation work.

STRENGTHS:
- Comfortable, intuitive navigation & interface
- Good reporting with PDF, Word, Excel output
- Email invoicing & electronic payment options
- Most commonly used program
- Mobile apps for client-focused work

800-267-8379

POTENTIAL LIMITATIONS:
- Financial statement generation requires optional Statement Writer
- Support is only free for 30 days

SUMMARY & PRICING
As we've noted in previous years, one of the most frequently cited advantages of using QuickBooks Accountant is that it's based on the same program used by the majority of small business clients, which eases data transfer in both directions.

Many accounting firms are starting to use hosted versions of Quick-Books along with QuickBooks Accountant to gain better interaction with clients. The program also offers a good collection of write-up tools, with new tools for batch reclassifying, write-offs and client billing, as well as built-in trial balance, good customization options and a familiar interface. A single-user license costs $399.95; a three-user version is $1,099.95. The optional Intuit Statement Writer is $119.95.

PRODUCT DELIVERY METHODS:
- ☑ On-Premises
- ☐ SaaS
- ☑ Hosted by Vendor

★★★★★	BASIC SYSTEM FUNCTIONS
★★★★☆	CORE WRITE-UP FEATURES
★★★★½	REPORTING & FINANCIAL STATEMENTS
★★★★½	IMPORT/EXPORT/INTEGRATION
★★★★½	HELP/SUPPORT SYSTEM

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10313929

www.accountant.intuit.com

Thomson Reuters – Accounting CS

2011 OVERALL RATING ★★★★★

BEST FIT:
Firms looking for a central write-up and trial balance system as part of a suite of integrated tax and practice management systems for managing workflow across all engagements.

STRENGTHS:
- Excellent integration
- Comprehensive reporting & financials
- Broad payroll compliance with state & some local support

800-968-8900

- Client-side accounting & collaboration
- Client portal options

POTENTIAL LIMITATIONS:
- Higher price point than many other systems
- Modules for AP & AR not scheduled to be implemented until November 2011 & Fall 2012, respectively.

SUMMARY & PRICING
One of the greater benefits of the Accounting CS system is in its integration with other programs in the CS Professional Suite, which helps streamline workflow processes across all engagements. The program offers extensive reporting and customization options, as well as strong payroll compliance tools. A four-user license for Accounting CS costs $4,300 for the first year (includes implementation and 60 days of support), with renewals priced at $1,400 per year.

PRODUCT DELIVERY METHODS:
- ☑ On-Premises
- ☑ SaaS
- ☑ Hosted by Vendor

THOMSON REUTERS

★★★★★	BASIC SYSTEM FUNCTIONS
★★★★★	CORE WRITE-UP FEATURES
★★★★★	REPORTING & FINANCIAL STATEMENTS
★★★★★	IMPORT/EXPORT/INTEGRATION
★★★★★	HELP/SUPPORT SYSTEM

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10314242

www.CS.ThomsonReuters.com

CCH Small Firm Services — Client Accounting Suite & Client Accounting Suite Premier

2011 OVERALL RATING ★★★★☆

BEST FIT:
Firms using the ATX or TaxWise tax and workflow products who want an easy-to-use write-up package with after-the-fact payroll reporting, financials generation and optional live payroll are a match with Client Accounting Suite. CCH ProSystem *fx* Tax and Practice Management users are supported with a special integrated version, Client Accounting Suite Premier.

STRENGTHS:
- Simple interface with strong small business software import

- Integrates with ATX & TaxWise tax and workflow systems
- Includes trial balance utility
- Flexible templates & financials reporting with bilingual capabilities (English/Spanish)

POTENTIAL LIMITATIONS:
- No bank statement import for reconciliation
- No client portal or collaboration tools

SUMMARY & PRICING
Client Accounting Suite is geared toward management of generally smaller business entities, but the program's features, particularly in batch processing of journal entries, recurring entries, ratios and its financial statement generation functions, are adept for virtually any business' needs. The program is best suited to users of ATX and TaxWise, offering solid integration and data transfer into those tax packages, but can be used as a standalone write-up utility, as well. Client Accounting Suite costs $520 for a site license usable by all in the practice. Client Accounting Suite with the live payroll option costs $795.

PRODUCT DELIVERY METHODS:
- ☑ On-Premises
- ☐ SaaS
- ☐ Hosted by Vendor
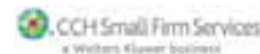
CCH Small Firm Services
a Wolters Kluwer business

★★★★	BASIC SYSTEM FUNCTIONS
★★★★	CORE WRITE-UP FEATURES
★★★★	REPORTING & FINANCIAL STATEMENTS
★★★★	IMPORT/EXPORT/INTEGRATION
★★★★	HELP/SUPPORT SYSTEM

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10314682

TaxWise: 888-455-0182; www.taxwise.com

ATX: 888-455-0183; www.atxinc.com

AccountantsWorld — Accounting Relief
2011 OVERALL RATING ★★★★½

BEST FIT:
Firms who want to bring both their practice and their clients onto a web-based accounting system that gives the firm greater control over data and the ability to monitor and control what their clients can do with their collaborative bookkeeping system.

STRENGTHS:
• Simple navigation & functions
• Integrates professional & client-side bookkeeping
• Anytime live access to client data for professionals
• Client portals & collaboration features
• Good communication templates & financials reporting

POTENTIAL LIMITATIONS:
• Limited batch processing functions

SUMMARY & PRICING
As a write-up system, Accounting Relief provides an easy-to-use program that includes tools that reduce client errors, and simplify correcting client errors and corresponding adjusting entries, reconciliation functions and other related tasks. The system also offers check writing and options for after-the-fact payroll reporting. The key benefit to the system is that clients are using an extension of the program tailored for their small business needs, with their data actually living in the professional's system. This eliminates the hassle of data transfers, and allows firms to stay in control of the data more proactively. The program costs $99 per month or $990 per year for the core accountant-centric part of the program, and $9.95 per month for each client using the business side of the application. First-year pricing specials are also available. Our editorial awards committee recognized Accounting Relief with a 2010 Innovation Award, and the system continues to be a very strong player in the SaaS client accounting market.

PRODUCT DELIVERY METHODS:
☐ On-Premises
☑ SaaS
☐ Hosted by Vendor

888-999-1366

Accounting Relief
Winner of the 2010 CPATA Technology Innovation Award

★★★★☆	BASIC SYSTEM FUNCTIONS
★★★★☆	CORE WRITE-UP FEATURES
★★★★★	REPORTING & FINANCIAL STATEMENTS
★★★★★	IMPORT/EXPORT/INTEGRATION
★★★★☆	HELP/SUPPORT SYSTEM

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10313945

www.AccountantsWorld.com/AR

Approaching Zero Data Entry — How Could That Be?

This year is shaping up to be a big year for innovation in the world of accounting services and client business processes. I've been researching several companies lately, and I'm learning how they view the market, how they build solutions, and what technology approach they believe will win the most customers today and into the future.

Have you ever noticed how some companies decide to lead customers while others just develop what customers ask for? Apple is the perfect example. Nobody ever asked Apple to develop a device that would hold all their music in their pocket (the iPod), or for a phone with applications (the iPhone), or a digital tablet with Internet and thousands of applications (the iPad). But Apple is really good at *leading* the marketplace and developing technologies and products that people *will want* as opposed to the product features people *ask* for. If Apple had wanted to give people what people wanted, they would have made a Windows PC. I'm a

Doug Sleeter

Mr. Sleeter is the founder of The Sleeter Group, a national group of accounting software consultants who serve small and medium-sized businesses. He is the host of the Accounting Solutions Conference and the author of several books including the QuickBooks Consultant's Reference Guide, and the leading market college textbooks "QuickBooks Fundamentals and QuickBooks Complete." For more information , call 888-484-5484 or visit www. sleeter.com. Doug can also be reached at Doug. Sleeter@CPAPracticeAdvisor.com.

former Apple Evangelist, and it really got into my blood that true innovation comes only when you're willing to do things that customers do NOT specifically ask for, but rather provide something that SOLVES their needs and becomes what they WILL begin asking for in the future.

In the accounting software world, nobody is specifically asking for some of the hottest new innovations coming to

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THE SUCCESSFUL COMPANIES BREAK THE RULES AND GIVE US A NEW WAY OF WORKING.

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market these days. But I predict the most successful companies will be those whose innovations solve many of the less-than-obvious customer pains and those who focus on the entire business process. When I say "entire" business process, I mean they must pay attention to not only their product, but also to how their product fits into the rest of the business system customers require. Even if that means they have to provide extra integrations to make their product work well with other, sometimes competitive, products.

The successful companies break the rules and give us a new way of working. They *lead* customers instead of just giving them what they ask for. But leading also means they need to make their products compelling enough to make us change our processes. For example, the idea of printing and mailing checks to vendors is really gut-wrenching to those of us who have seen the light and begun using online bill payment services like Bill.com. But for some, the idea of changing their bill payment process is really a scary concept, filled with fear and doubt.

The driving force behind so many of these new and innovative products is what I call, for lack of a better term, a *new world* that completely changes how we use technology. In my July 2011 column (www.CPAPracticeAdvisor.com/ 10278833), I described the new world and discussed how it forces us to rethink

our standard ways of working. Probably the biggest step forward is mobile devices and smartphones. The rate of adoption of mobile solutions is mind boggling, and it's quickly becoming accepted that there's an "app for everything." This means we can assume everyone has the ability to access *and interact with* information anytime, anywhere … even without a computer. That's HUGE.

As we think about the practice of accounting as well as client business processes that touch the general ledger, we suddenly have incredible new tools that allow us to design and implement interconnected applications, mobile apps, data feeds and portals that enable us to collaborate with and serve clients in ways that were simply impossible just a few years ago.

For several years now, we've been using systems where customers and vendors can enter accounting data for us when they place orders on our web stores, or when they send us electronic invoices. Compared with our old world of faxes and paper documents (both sales orders and vendor invoices), in which data is manually entered by the bookkeeper, that is a significant leap ahead for efficiency, accuracy, and reduction of the cost of bookkeeping. This is the trend at the core of what I mean by "zero entry."

We're also seeing portals emerge where accounting firms can publish financial statements and tax returns, as well as client-facing "dashboards" that allow clients to run the business with real-time access to financial information and key performance indicators. This is also huge because it brings a variety of new client services for accounting firms, software consultants and business management consultants.

Here are a few products that take

maximum advantage of these "new world" technologies:

The first is **Xero**, a relatively new online accounting product from New Zealand that is about to hit the U.S. market. Xero takes us towards a whole new paradigm where we won't enter transactions into accounting systems, but instead manage "data flows" on the Web where transactions are entered for us. Now, before you dismiss the idea of zero data entry, take a look at Xero's vision.

The Xero philosophy is to move us away from data entry and towards connecting business processes with the accounting system via software connections and data flows. We realize the goal of zero data entry by connecting the Xero product to banking feeds, customer-entered data, vendor-entered data, employee-entered data and automated entries that free the "bookkeeper" from *entering* data. The bookkeeper role doesn't completely disappear, but the role changes dramatically from being the expert on *how to enter transactions efficiently* to *how to manage transactions and other "data flows" on the Web*. There will be *some* data entry, but only a fraction compared to the way we do things today. This is another HUGE thing. It means all the skills we acquired in the bookkeeping space can now be used to "teach" these various systems to talk together and trasmit the data between the apps in ways that serve the particular needs of the clients. This stuff can't be left to the techies because they are not accounting professionals and don't have the broad range of skills that accountants have for managing different types of businesses.

Xero is a full online general ledger product that connects to major banks and pulls bank and credit card transaction data directly into the application. Through the developer interface, dozens of add-on developers also offer an impressive range

of business process applications that feed data into Xero. So it's quickly realizing the goal of providing a complete system with online invoicing, payables, payroll, ecommerce, fixed assets, employee expense management, and nearly all of the functions that most small businesses need from their accounting system.

Although it's a relatively new product, the depth of functionality is impressive. Of course, customers who are used to mature desktop accounting products will no doubt have a long list of things they want Xero to add, but the speed at which those features are being added is quite impressive.

Mint is a similar product. Mint is Intuit's free online personal financial management product that allows individuals to set up a complete personal finance tracking system on the web that maintains an always-up-to-date personal balance sheet, including all your account balances, retirement accounts, mortgages, home values and credit cards.

Wave accounting is another similar product for small businesses. Like Mint, it's a free product. Wave also believes in zero data entry and allows small businesses to set up data feeds from banks and credit cards to eliminate as much data entry as possible.

Another example of the zero data entry philosophy is demonstrated in **Bill.com**'s Zen feature, where all vendor bills are faxed or e-mailed to a special address where the transactions are entered for you.

How Zero Entry Changes Everything for Accountants

Accountants have two big points to consider about these new technologies. While I believe this is a move in the right direction, taking advantage of the opportunities might require some pain and retooling.

The first point is that these new technologies allow accountants to be **collaborators** with small business owners. For the first time ever, we can now help clients manage their accounting data in **real-time**. This is a key philosophical difference from the old desktop software world because it allows accountants to reclaim "control" of the general ledger, while at the same time providing a much higher level of service to their clients.

The second point, and perhaps a bit painful at first, is that accountants, bookkeepers and consultants will need to develop a whole new set of skills. Instead of focusing on installing, setting up, training, troubleshooting and cleaning up client-entered data, you will need to become a "Lego master" who constructs connections between applications, a manager of data feeds, and a wizard with web-based "data flows." Instead of focusing on helping clients enter the data better, you will help clients build systems where most data gets entered *automagically* so that the clients can focus on running their business. And as soon as you get that all working, you can move up the value chain and provide high-value business consulting services including business analytics, real-time dashboards and management consulting services. These are the services your clients may not be asking for, but believe me, they need these services much more than they need someone to teach them how to enter and pay bills. ●

The Peachtree Perspective becomes The Sage Perspective

This is the last column that will be called "The Peachtree Perspective." Although Sage Peachtree is one of the first names in accounting software (from the perspective of its stature in the industry, as well as its long history), the world has changed since Peachtree was an independent software company that created software to run on the Osborne personal computer. During the last 13 years, however, Sage Peachtree has been part of the Sage family of solutions, a large organization which has strong products in many markets — Sage ACT! and Sage Simply Accounting on the low end, Sage ERP MAS 90/200, Sage ERP Accpac, Sage Abra, and Sage CRM in the mid-range space, and Sage ERP X3 and Sage SalesLogix to serve enterprise customers.

The world has changed, however. Businesses now demand that business applications work better together, and we demand that large organizations function like one small, nimble business instead of as a series of loosely connected silos. We demand this because the world expects more from businesses today. Sure, every startup doesn't need office space and a $10,000 phone system, but we are also expected to be accessible 16 hours a day (or more), and we are required to do much more with fewer resources. Accordingly, the name Peachtree, as well as other names like Simply Accounting, MAS 90 and ACCPAC must take a back seat to the lead business and the overall brand behind these applications — Sage.

Sage North America handles its brands differently than the other Sage divisions. The business management applications it sells in Europe, Asia and Africa do not retain the pre-

The changes taking place, however, are not just related to the names of the products. There are some things going on behind the scenes that will make the applications more interoperable. More than a year ago, Sage announced a new initiative called SDATA. SDATA is a set of common data exchange protocols and data layouts that will make it possible for Sage products to interface with outside applications and websites using standard web protocols such as HTTP and ATOM. Some of the Sage applications now offer web-enabled access to data streams, as witnessed by the tools available at http://sdata.sage.com, including an add-in for Excel, a web-based data access tool, and widgets for extracting data from on-premises or hosted solutions into web-based dashboards.

In addition to the SDATA initiative, all of the entry-level accounting and mid-market ERP applications have

consultants should be able to work on multiple applications by learning how to work with this tool.

While Sage doesn't change its history of 30 great years of supporting American and Canadian small businesses, nor do they want to erode the goodwill associated with the Peachtree name, this is a very different application than the one that ran on that $5,000 Osborne computer over three decades ago. With tools like the web-based e-marketing services, integration with contact management tools like Sage ACT!, and advanced business intelligence tools, this product is not the same application that was typically paired with an Epson MX-80 dot matrix printer … so perhaps it should have a different name. The applications also work better together than they ever have in the past, and they are starting to offer more integration and collaboration than ever before. So it's more reasonable to think of this as one organization instead of a series of independent companies, and I think it's necessary for the product we now call Sage Peachtree to be able to change to meet the needs of the next generation of workers.

The Peachtree Perspective has graduated, and has become The Sage Perspective. See you next month. ●

Brian Tankersley, CPA.CITP, Technology Editor

Brian Tankersley is a Knoxville, Tennessee CPA and consultant whose practice is focused on technology consulting and training for accountants. Brian is a nationally recognized speaker with K2 Enterprises (k2e. com), and blogs on accounting technology at CPATechBlog.com. Comments, suggestions, and errata are always welcome, and should be e-mailed to brian.tankersley@ CPAPracticeAdvisor.com.

> THE NAME PEACHTREE, AS WELL AS OTHER NAMES LIKE SIMPLY ACCOUNTING, MAS 90 AND ACCPAC MUST TAKE A BACK SEAT TO THE LEAD BUSINESS AND THE OVERALL BRAND BEHIND THESE APPLICATIONS — SAGE.

acquisition naming structure (e.g. Sage ERP X3 was previously called Adonix). In the United Kingdom, where Sage is a leading public company, its products are branded as Sage products (e.g. Sage One, Sage 50 Accounts, Sage 100, etc.). While all the details are not finalized just yet, the next major release of the product we now call Sage Peachtree will carry a name that puts the Sage name first, and will most likely minimize or eliminate the legacy name of the product.

implemented the Sage Business Intelligence Excel-based reporting tool. This tool makes it possible to combine data from these applications with data from other ODBC data sources into financial, operational and management information reports, which will allow users to drill down into the underlying detail from the accounting software. This same Business Intelligence tool is implemented in most of Sage's other accounting and ERP solutions, so

40RTY UNDER 40RTY

A Challenge to the 2011 40 under 40 Honorees: Create a Vision

Congratulations to the 2011 "40 under 40" tax and accounting profession leaders!

I envy young professionals today because we are keenly aware of the importance of networking and programs that help to polish leadership skills. The Kansas Society of CPAs has its "20 up to 40," one of many successful leadership development programs sponsored by state CPA societies, and the AICPA is ready to launch its third Leadership Academy. I am proud of the impact these programs have had on our profession and even more proud of the caliber of the individuals who are embracing leadership as a professional responsibility.

With recognitions such as the "40 under 40" comes responsibility. It is a responsibility to craft a vision for the profession that impacts positively on our society, to develop strategies, and to take action that transforms vision into reality.

So it is not my goal today to extol wisdom or present accolades or to even make this an "advice" column. Rather, I wish to take this opportunity to challenge the "40 under 40" to envision a positive future that sustains our role as the most trusted advisor!

Before Bill Gates and Paul Allen ever wrote BASIC for Microsoft, they were talking about "a computer on every desk and in every home." That was perhaps 1977, when the eldest of today's 40 under 40 were barely out of diapers. It sounded silly back then when business students were still stacking up "punch cards" and frustrated with their typos during "debugging." Today, we call these words vision.

When I started my career in public accounting, the managing partner chastised me for using a memory typewriter in my attempt to more efficiently create a spreadsheet because "professionals don't type." That sounds silly today!

But what sounds silly today may very well be a vision of our future, and the reality of the past may seem quite silly by today's standards.

That's what vision is all about. Vision unleashes our creativity and gives us permission to dream … and to be somewhat silly. The fact is no profession is better able to solve problems with vision than the accounting profession. So we look to the "40 under 40" to ask the right questions that pull us into the future and create a better world, not only for business, but also for our society.

When Bill Gates and Paul Allen started to expound their vision almost 40 years ago, did we really think that was going to happen? Did we really think that we would all be able to afford our own computers?

And today, we have to wonder how soon the PC will become part of history as our mobile society relies more on affordable tablets and smartphones. With the way transactions are captured today, we have to ask ourselves if tax professionals will become obsolete. In fact, what will the role of the accountant be in 2041, 30 years from now? With the exponential rate at which technology is growing, the next 30 years will leave the last 30 years in the dust. If we sit in a vacuum and think accounting services will be the same as they are today, this profession will also be left in the dust.

As an eternal optimist, I don't believe accountants will become obsolete because we are creative problem solvers and systems designers … and we are adaptable. Did I say creative and adaptable? Yes! Accountants use their natural problem-solving ability to understand the process of making decisions. And as the type of information needed to make decisions changes, so do we. Accountants create the information that is the foundation for decision-making. We ensure that it is understandable, useful, reliable and delivered in a timely manner.

Information and communication are ubiquitous.They are global and virtually free. I believe in extropy, the theory that through intelligence and technology, our systems will grow more organized and pervasive. That may sound silly today when we have 20,000 to 50,000 e-mails to deal with each year, but I assure you that what seems silly today will be called a vision in the future. And when it comes to information and systems, no one is better prepared to create the solution than a tax and accounting professional.

Congratulations, again, to this year's 40 under 40 honorees. I am proud of you all! Now, go create a vision! ●

By Mary R. MacBain, MS, CPA.CITP, President/CEO, Kansas Society of CPAs

Mary is responsible for implementing the strategic plan of the leadership of the KSCPA. She has over 30 years of experience in administration, accounting and primarily as an information systems consultant. Mary implemented hundreds of information systems with the goal of achieving mobile, real-time and paperless environments.

Anna Lopez Brosche, CPA — 39

Managing Partner
Ennis, Pellum & Associates, CPAs
Jacksonville, Florida

Dustin Wheeler, CPA — 32

Accountant/IT Manager —
Wallace Neumann & Verville LLP
Las Vegas, Nevada

David Wyle, CPA.CITP — 39

President & CEO — SurePrep, LLC
Irvine, California

Noel Abdur-Rahim, CPA — 28

Manager —
PricewaterhouseCoopers LLP
Detroit, Michigan

Gregg M. Cole, CPA.CITP — 39

President/CEO,
Borusiewich & Cole, PC
St. Louis, Missouri

Dan Wernikoff — 39

Sr. Vice President & General Manager,
Financial Management Solutions —
Intuit
Mountain View, California

Dominique Molina, CPA, CTC — 36

President, The American Institute
of Certified Tax Coaches
San Diego, California

Jon Petit, EA — 29

Account Manager — CSI
Accounting Services
Minneapolis, Minnesota

Jim Boomer, CPA.CITP — 35

CIO/Shareholder,
Boomer Consulting, Inc.
Manhattan, Kansas

Adrian G. Simmons, CPA — 32

Principal —
David G. Simmons, CPA
Laurel, Maryland

Jarvis Soeda — 38

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SaaS, CCH, a Wolters Kluwer
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— Sage
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National Director of Technology —
Reznick Group
Bethesda, Maryland

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Partner — Linford & Company LLP
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Irvine, California

REVIEW SECTIONS

BASIC SYSTEM FUNCTIONS
- General Navigation/Ease-of-Use
- Designed for Accounting Professionals
- Concurrent Users
- Scalability (number of payrolls handled)
- Multiple Pricing Options
- Multi-Client Management
- Payroll Tax Tables (for all states, jurisdictions, municipalities)
- After-the-Fact Payroll
- Multi-State Taxes
- Direct Deposit
- Common Paymaster Calculations

REPORTING & MONITORING
- Compliance Due Date Tracking/Monitoring
- Quarterly & Annual Forms for all States
- E-filing & Payment
- Customizable Reports
- Dashboards for Employee Management
- Worker's Comp Tracking

INTEGRATION/IMPORT/EXPORT
- Integration w/programs
- Integration w/external programs (GL export, etc.)
- Built-in Timesheet Management
- Time Clock Import
- Web timesheet/phone time reporting support
- Data import/export formats supported

HELP/SUPPORT
- Built-in Support Features
- System updates (best if downloadable or automatic download)
- Support website/documentation
- Templates for creating employer instructions to employees
- Live Support (includes phone)
- Live Support days/hours/location
- Dedicated account rep assigned

CLIENT SELF-SERVICE FEATURES
- Employee Self-Service Portals
- Client Portals for Data Entry & Reporting
- Firm-Branded
- Paycheck Stub & W-2 Portal Delivery

SUMMARY & PRICING

For full product reviews of the products on the following pages, as well as reviews of the following products, go to www.CPAPracticeAdvisor.com/10318407:
- APS Online
- CheckMark Payroll
- CompuPay PowerPayroll
- CompuPay XpressPayroll
- QuickBooks Payroll Enhanced for Accounting Professionals
- Paylocity Web Pay

4 Models To Position Payroll As A Profit Center

Payroll is an important part of any business, and most payroll solutions currently available are capable of providing support for all business types and sizes. Although technology and automation have made compliance much easier, payroll continues to grow in complexity. As with most tax compliance rules and regulations, the reporting and tax compliance issues for payroll are constantly changing. Keeping up with these changes is difficult for any accounting professional, much less the average small business owner. Add to this the increasing demand for human resource (HR) management functions and the situation gets even more complicated.

Due to the changing nature of payroll, accounting professionals are constantly sought after for guidance with payroll-related issues. While most accounting professionals have a knowledgebase capable of handling all aspects of payroll, many may not have the requisite time or dedicated staff resources to perform the work. In addition to time and staffing issues, accounting professionals also have different views on the proper model to use for processing payroll. Some prefer to perform all or most of the payroll functions themselves, while others prefer to maintain a management role and review payroll periodically.

With recent improvements in web-based technologies, many payroll vendors are offering multiple online services. These offerings are typically pay-per-use and offer varying levels of client, accountant and vendor responsibilities. Traditional on-premise software is also available for clients and accounting professionals to manage payroll. On-premise solutions can require more upfront investment, but may ultimately be more cost effective. Regardless of the vendor solution, today's payroll software offers a significant amount of automation to reduce the error rate and time spent in processing payroll. Many of today's payroll systems are also incorporating HR management functions that were historically only available to large enterprises.

In last year's payroll system reviews, we introduced four general models of payroll systems. These models span from client in-house solutions to payroll vendor outsourced solutions that have minimal client input requirements and accounting professional involvement. For this year's payroll system review, we have retained these models to easily identify the level of service to be performed.

The payroll solutions reviewed here may help accounting professionals direct a mundane activity into a profitable service offering. By turning low-cost services into high-gross margin work, accountants may also create a new revenue stream. Accountants offering payroll services are also in a position to gain additional work through frequently interacting with their current clients' most valuable assets, their employees.

Payroll System Models
- **Full-Service Payroll Systems** are thought of as traditional service offerings and are controlled wholly by the accounting professional. Clients provide employee hours and other information, and the accountant processes all payroll checks and required reports.

> TODAY'S PAYROLL SOFTWARE OFFERS A SIGNIFICANT AMOUNT OF AUTOMATION TO REDUCE THE ERROR RATE AND TIME SPENT IN PROCESSING PAYROLL.

- **Partially Assisted Payroll Systems** are designed to offload the compliance processing to a payroll vendor. Employee hours and other information are provided by the client, but the accountant processes or reviews this information before each payroll run. Many solutions in this category are web-based, pay-per-use services that require little operating costs for the accounting professional.
- **Direct Client/Business Use Payroll Systems** provide employers the capability to manage their own payroll processing in-house while the accounting professional has the ability to view reports and pull financial data into a general ledger as needed. In this setup, the accounting professional provides oversight only as necessary.
- **Outsourced/Referral Payroll Systems & Programs** are generally web-based solutions that blend client, accountant and payroll vendor collaboration. Clients will provide all employee data, while accountants will run the required financial and general ledger import reports. All back-end compliance is handled by the payroll vendor. ●
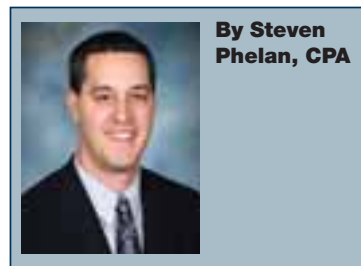
By Steven Phelan, CPA

At ADP® we understand that every practice is different – that's why we offer accountants many options.

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- **Let ADP process your clients' payroll for you** – RUN Powered by ADP Payroll for Accountants® is specifically designed to help accountants more efficiently process their clients' payroll. This powerful online application allows you to offer your clients additional value and services that can help increase client retention, help keep them compliant, and provide your firm with a new source of revenue.

- **Sell your payroll base to ADP** – Put your payroll clients in experienced hands while providing you the opportunity to generate capital and free up time to focus on building your practice.

- **Earn Rewards or Share Revenue for Referring Your Clients** – ADP's Referral Rewards and Revenue Share Incentive programs offer you the chance to earn points towards valuable gifts or earn revenue for your firm, while providing value-added payroll and HR solutions to your clients.

1 800 CALL ADP
accountant.adp.com

HR. Payroll. Benefits.

Cougar Mountain Software — CMS Professional 2012 Payroll

{DIRECT CLIENT/BUSINESS USE}

2011 OVERALL RATING ★★★★

BEST FIT
Users who want an on-premises application for processing large payrolls and those who use other Cougar Mountain Software offerings. It's also a good fit for those who want to prepare and transmit their own payroll tax filings or outsource to a third party (Aatrix).

STRENGTHS
- Supports unlimited number of businesses with multiple department codes, pay frequencies & job costing data, as well as custom fields.
- Tight integration with other CMS modules; however, integration with other packages not natively supported.

- Custom reporting & branding of reports with add-on module.
- Supporting documents can be attached to the master records, i.e. PR employees, from within the application.

POTENTIAL LIMITATIONS
- Internet-based employee & company portals not supported.

SUMMARY & PRICING
Although Cougar Mountain Software licenses its software to a number of wholesale and nonprofit businesses, CMS Professional Payroll provides functionality for any business type.

Cougar Mountain Software prides itself on the service and support offered to its customers as well as the tight vertical integration of its products. Payroll can be purchased with CMS Professional or as a stand-alone product. Single-user licenses start at $699 with four-user and unlimited user licensing starting at $899 and $1,149, respectively. All licenses also come with the ability to upgrade to Cougar Mountain Software's Software Assurance program. Service fees for any Aatrix subscription services are not included with the above pricing and are billed separately.

PRODUCT DELIVERY METHODS:
- ☑ On-Premises
- ☐ SaaS
- ☐ Hosted by Vendor

★★★★	BASIC SYSTEM FUNCTIONS
★★★★	REPORTING & MONITORING
★★★★	INTEGRATION/IMPORT/EXPORT
★★★★	HELP/SUPPORT
N/A	CLIENT SELF-SERVICE

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10317517

800-388-3038   www.cougarmtn.com

AccountantsWorld — Payroll Relief

{PARTIALLY ASSISTED}

2011 OVERALL RATING ★★★★½

BEST FIT
Any accounting firm that wants to offer payroll services directly to their clients. This cloud-based payroll service is private-labeled and can be configured to meet the needs of different clients. It is also a good fit for firms that would like to work with a web-based suite of tax & accounting firm tools.

STRENGTHS
- All-inclusive with features such as direct deposit, federal & state electronic filing, & employee self-service portals at no additional charge.
- Client-facing websites can be rebranded to show the firm's logo, as well as client company logo.

- Control of tax filing & paying process, as well as the multi-client dashboard, protect the accountant & client against errors with tax payments.
- Strong integration with the AccountantsWorld suite of applications.

POSSIBLE LIMITATIONS
- AccountantsWorld only sells to practicing accountants, and does not offer a direct sales model where an accountant is not involved in a sale.

SUMMARY & PRICING
AccountantsWorld prides itself in partnering with accounting professionals to offer payroll services through Payroll

Relief. The product is specifically designed with accounting professionals in mind and offers features to aid firm profitability. First year pricing for accounting firms is set at a base price of $997 and includes the ability to process an unlimited number of payrolls. Subsequent years are dependent upon the number of payroll runs or paychecks that are processed on an annual basis. A firm processing 10 paychecks or less for a weekly payroll frequency starts at $5.95 per payroll. A per paycheck option is more beneficial for firms processing 1,500 or more paychecks annually, with 25,000 or more paychecks priced as low as $0.50 per paycheck.

PRODUCT DELIVERY METHODS:
- ☐ On-Premises
- ☑ SaaS
- ☐ Hosted by Vendor

★★★★☆	BASIC SYSTEM FUNCTIONS
★★★★☆	REPORTING & MONITORING
★★★★☆	INTEGRATION/IMPORT/EXPORT
★★★★☆	HELP/SUPPORT
★★★★★	CLIENT SELF-SERVICE

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10317502

888-999-1366   www.accountantsworld.com

Red Wing Software, Inc. — CenterPoint Payroll

{FULL-SERVICE PROFESSIONAL}

2011 OVERALL RATING ★★★★☆

BEST FIT
CenterPoint Payroll is a good solution for most small businesses and payroll service providers who process payroll for multiple companies and who may want some limited HR management capabilities. It's also a good fit for organizations that use Red Wing's CenterPoint or TurningPoint accounting software applications.

STRENGTHS
- Check Designer natively supports printing of paychecks, signatures & MICR data on blank check stock.
- Employee documents can be output in multiple languages.

- Time data can be imported from a wide range of applications in a text file format.
- Direct deposit (your bank may charge a transmittal fee) and electronic filing available at an additional charge.

POTENTIAL LIMITATIONS
- Does not natively support integration with accounting software other than CenterPoint or TurningPoint, other than exporting a text file from the CenterPoint Payroll application. Red Wing does offer an API allowing for direct integration; access to the API is normally limited to third-party partners.

- A web-based employee self-service portal is being developed, but no final release date has been announced.

SUMMARY & PRICING
Red Wing Software handles unique payroll functions for many agriculture and nonprofit businesses; CenterPoint Payroll provides many customization options that may benefit any business type. The program offers a variety of customization options and straightforward navigation. Pricing for a single-user license is $795. Network users will pay $295 for each seat, and other add-on modules are available starting at $95.

PRODUCT DELIVERY METHODS:
- ☑ On-Premises
- ☐ SaaS
- ☐ Hosted by Vendor

★★★★☆	BASIC SYSTEM FUNCTIONS
★★★★☆	REPORTING & MONITORING
★★★★☆	INTEGRATION/IMPORT/EXPORT
★★★★	HELP/SUPPORT
N/A	CLIENT SELF-SERVICE

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10318204

800-732-9464   www.redwingsoftware.com

Intuit Online Payroll for Accounting Professionals by Intuit ProLine

2011 OVERALL RATING ★★★★☆

BEST FIT

Small businesses and accounting professionals who want a web-based payroll application that provides the ability to collaborate with users at other sites. It's also a good fit for QuickBooks for Mac and QuickBooks Online users who want a payroll tool that integrates directly with their software.

STRENGTHS

- Web-based payroll application with employee portals, electronic filing & collaboration with remote personnel.
- Mobile app is available for iOS
- Portals & reports can be branded with the firm's name.
- Integration supported for QuickBooks (Windows, Mac & Online), Quicken, Sage Peachtree, and ATX/ TaxWise Write Up, as well as Excel or text-based data export.
- SaaS model eliminates the need for application installation or updating.

POTENTIAL LIMITATIONS

- Custom reporting may require export & manipulation of data in Excel.
- Although multiple logins are permitted for each company, access is restricted for each company to only one user at a time, and companies cannot have more than 150 employees.

SUMMARY & PRICING

Intuit Online Payroll for Accounting Professionals offers a clean interface that is easy to use and allows accounting professionals to brand themselves through payroll service offerings. Several included features may aid in increased profitability. All pricing is flat rate and includes most payroll features such as unlimited payroll runs, direct deposit and employee portals. Pricing starts at $19.99 per client, per month for up to five clients, with each client having five or fewer employees. For six or more clients, pricing is tiered, and billing will automatically revert to lower pricing as more clients are added. For those with 50 or more clients, pricing is $10.99 per client, per month for five or fewer employees. A time tracking module is available and is priced per employee at $2 per month.

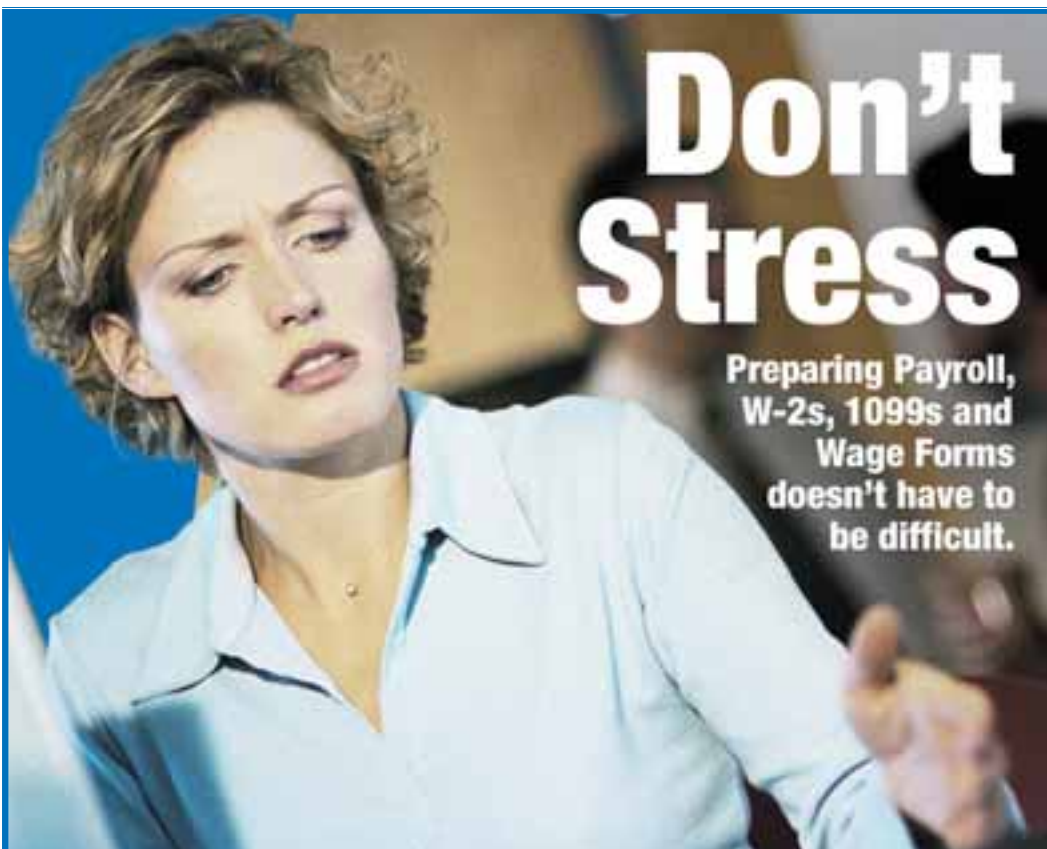### PRODUCT DELIVERY METHODS:

☐ On-Premises
☑ SaaS
☐ Hosted by Vendor

intuit ProLine

Rating	Category
★★★★☆	BASIC SYSTEM FUNCTIONS
★★★★☆	REPORTING & MONITORING
★★★★☆	INTEGRATION/IMPORT/EXPORT
★★★★☆	HELP/SUPPORT
★★★★☆	CLIENT SELF-SERVICE FEATURES

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10318416

888-236-9501 www.accountant.intuit.com/payroll

Advanced Micro Solutions, Inc. — 1099-Etc, A-T-F Payroll

{FULL-SERVICE PROFESSIONAL}

2011 OVERALL RATING ★★★★

BEST FIT
Accounting professionals and small businesses who need a value-priced program for after-the-fact payroll & employment tax compliance, as well as firms who prefer locally installed applications to web-based tools.

STRENGTHS
• Good tool for year-end reporting & interim after-the-fact payroll & tax compliance.
• Electronic wage detail filing is supported for more than 25 states.
• Base price of $75/year & a full package at $405/yr including all modules (ATF payroll, tax tables, program updates & fileable payroll tax forms) is a great value.
• Imports from QuickBooks & Sage Peachtree and other systems using CSV & Excel files.

POSSIBLE LIMITATIONS
• Importing of timesheet data not supported.

SUMMARY & PRICING
1099-Etc is a good fit for businesses with small payroll loads or that only need to process year-end forms. The program is intuitive to use and requires very little upfront training. Pricing is done per module with the complete system available for around $405. Pricing starts at $75 for the base package, which includes all W-2 and 1099 reporting. Additional modules include printing on blank paper via laser printer, after-the-fact payroll, electronic filing and all payroll forms capabilities, each priced per module, starting at $75. All pricing is annual and not monthly, quarterly or per use.

PRODUCT DELIVERY METHODS:
☑ On-Premises
☐ SaaS
☐ Hosted by Vendor

Rating	Category
★★★★	BASIC SYSTEM FUNCTIONS
★★★⯪	REPORTING & MONITORING
★★★★	INTEGRATION/IMPORT/EXPORT
★★★★⯪	HELP/SUPPORT
N/A	CLIENT SELF-SERVICE

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10318295

800-536-1099   www.1099-Etc.com

Sage HRMS

{DIRECT CLIENT/BUSINESS USE}

2011 OVERALL RATING ★★★★⯪

BEST FIT
Companies who want a solid on-premises or third-party hosted payroll system with full HR management capabilities.

STRENGTHS
• Strong payroll capabilities, including support for U.S. & Canadian payroll.
• Employee portal module (Sage Employee Self Service).
• HR management a leader in the industry; includes support for e-mail alerts & confirmations for changes to employee benefit elections.
• Integration supported with most Sage applications; data can be exchanged with other applications by exporting to Excel, Access or XML format.
• Sage Employee Self Service appearance can be modified to be consistent with company or firm branding.

POTENTIAL LIMITATIONS
• Web-based version not available; however, a hosted version is available through nGenX and Applianz.

SUMMARY & PRICING
Sage HRMS offers a strong software solution that provides a number of options to manage payroll and HR functions in-house. Users of Sage HRMS are directly involved with new feature development, which helps ensure the products are up-to-date and offer new features that users really want/need. Pricing for Sage HRMS is dependent upon the number of active employees stored in the database and starts under $2,250. This price level includes all the HR functionality and U.S. or Canadian payroll processing for up to 75 employees. Discount pricing is available to users enrolled in the Sage Accountants Network.

PRODUCT DELIVERY METHODS:
☑ On-Premises
☐ SaaS
☑ Hosted by Vendor

Rating	Category
★★★★⯪	BASIC SYSTEM FUNCTIONS
★★★★⯪	REPORTING & MONITORING
★★★★⯪	INTEGRATION/IMPORT/EXPORT
★★★★⯪	HELP/SUPPORT
★★★★⯪	CLIENT SELF-SERVICE

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10318223

800-424-9392   www.sageabra.com

PenSoft Payroll Solutions—PenSoft Payroll Accounting Edition

{FULL-SERVICE PROFESSIONAL}

2011 OVERALL RATING ★★★★

BEST FIT
Accounting professionals who provide payroll processing for multiple clients and prefer an on-premises application.

STRENGTHS
• Drag-and-drop report modification allows custom reporting, which can be saved for future use.
• Unlimited number of users can access each company file simultaneously.
• Export files available for QuickBooks & Sage Peachtree, or data can be imported/exported using Excel.
• Supports complex requirements such as job costing, multiple shift differentials, Certified Payroll & consolidated reporting.
• No additional charge for processing multiple payroll in multiple states.

POTENTIAL LIMITATIONS
• Does not include due date tracking.
• Employee portals & state electronic payments not supported.

SUMMARY & PRICING
PenSoft Payroll Accounting Edition is an easy-to-use and -navigate payroll solution. With no additional charges to process multiple states or to have access to unlimited support, PenSoft Payroll Accounting Edition may prove to be a cost-effective for accounting professionals. PenSoft prices each edition as a calendar year subscription and is based on the number of employees in the largest company currently processed through the system. Initial pricing for PenSoft Payroll Accounting Edition starts at $1,629 for processing unlimited clients each with less than 50 employees. Annual renewal pricing is slightly discounted for future years.

PRODUCT DELIVERY METHODS:
☑ On-Premises
☐ SaaS
☐ Hosted by Vendor

Rating	Category
★★★★	BASIC SYSTEM FUNCTIONS
★★★⯪	REPORTING & MONITORING
★★★★⯪	INTEGRATION/IMPORT/EXPORT
★★★★⯪	HELP/SUPPORT
N/A	CLIENT SELF-SERVICE FEATURES

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10318177

888-736-7638   www.pensoft.com

CCH Small Firm Services — ATX Payroll & TaxWise Payroll

2011 OVERALL RATING ★★★★

BEST FIT
Accounting firms and small companies who need a live and after-the-fact payroll preparation tool designed to work with the TaxWise and ATX tax compliance brands, as well as firms who are using CCH ProSystem *fx* Practice Management, or need check in/checkout capabilities.

STRENGTHS
- Direct deposit files can be generated from within application & are compatible with most financial institutions.
- Paychecks can be printed on blank check stock; application prints MICR encoding.
- Check in/checkout for company files permits offline collaboration; after-the-fact payroll supported.

- Data can be imported from Quick-Books, Sage Peachtree, ProSystem *fx* Practice Management or text files & can be exported to the ATX & Tax-Wise write-up applications.
- Separate modules for live payroll, tax forms/e-filing & payroll compliance allow users to purchase only the tools needed.

POTENTIAL LIMITATIONS
- Reports cannot be customized, although reports can be exported to Excel for filtering.

SUMMARY & PRICING
With the ability to bundle payroll and accounting software together, as well as the availability of multiple modules, the ATX and TaxWise Payroll systems provide cost-effective payroll solutions for accounting professionals serving small business clients. Pricing for the core live payroll module is $395 and allows for unlimited client files and employees. Electronic filing capabilities through the W-2/1099 module are $199, and the Payroll Compliance Module is $349. The core live payroll solution and W-2/1099 module may also be bundled with the available accounting software solution for $995.

PRODUCT DELIVERY METHODS:
- ☑ On-Premises
- ☐ SaaS
- ☐ Hosted by Vendor

Rating	Category
★★★★	BASIC SYSTEM FUNCTIONS
★★★★☆	REPORTING & MONITORING
★★★★☆	INTEGRATION/IMPORT/EXPORT
★★★★☆	HELP/SUPPORT
N/A	CLIENT SELF-SERVICE FEATURES

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10318436

ATX: 888-455-0183; www.atxinc.com
TaxWise: 888-455-0182; www.taxwise.com

RUN Powered by ADP Payroll for Accountants

{OUTSOURCED/REFERRAL}

2011 OVERALL RATING ★★★★☆

BEST FIT
Firms who manage payroll and compliance needs for multiple client businesses, but who prefer most compliance work to be outsourced. It's also a good fit for professionals who want to provide HR tools and workers' compensation premium payment solutions.

STRENGTHS
- Available in full-service or do-it-yourself versions.
- Offers add-on HR and associated services.
- Full-service model has payment of all federal, state & local payroll tax liabilities, & reporting performed by ADP. If ADP makes an error, it will pay the resulting fines and penalties in accordance with its contract terms.
- GL export function puts data into formats that can be imported by QuickBooks, Sage Peachtree & other accounting packages.
- Allows firms to provide client self-service portals with access to program features and functions, such as data and time entry, reporting, etc.
- Client side of system can be co-branded with the firm's logo.

POTENTIAL LIMITATIONS
- Federal & State e-filing not available in Accountants version.
- Limited report customization.
- Employee self-service limited to accessing pay stubs, with no access to W-2s or HR information.

SUMMARY & PRICING
RUN Powered by ADP Payroll for Accountants offers comprehensive federal, state and local payroll management capabilities, with a simplified interface that streamlines and automates most functions. It also gives firms the ability to grant client access to input their own employee data. Different service levels allow firms to decide whether to manage payroll compliance and payment processes or have ADP handle those areas on a client-by-client basis. The system is offered to accountants at a discounted rate, and billing is directed to the firm. Pricing is based on the number of businesses, how many employees they have, the frequency of payroll runs, and whether or not the payroll tax filing is managed by ADP or the firm. Standard pricing ranges from $22 a month for "do-it-yourself" solutions up to $60 a month, plus a per-employee processing charge, for full-service tax filing solutions. Additional volume pricing discounts are available for full-service tax clients.

PRODUCT DELIVERY METHODS:
- ☑ On-Premises
- ☐ SaaS
- ☐ Hosted by Vendor

★★★★☆	**BASIC SYSTEM FUNCTIONS**
★★★★☆	**REPORTING & MONITORING**
★★★★☆	**INTEGRATION/IMPORT/EXPORT**
★★★★☆	**HELP/SUPPORT**
★★★★☆	**CLIENT SELF-SERVICE**

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10318285

800-Call ADP (225-5237)   **www.accountant.adp.com**

For more information, go to cpapracticeadvisor.com/company/10015448

SurePayroll for Accountants

2011 OVERALL RATING ★★★★☆ {FULL-SERVICE PROFESSIONAL}

BEST FIT
Clients or firms who want a robust, web-based payroll solution with strong features such as a mobile application, employee self-service portals and integration with numerous accounting software applications.

STRENGTHS
- Interfaces provided for QuickBooks, Sage Peachtree, AccountEdge & Intacct (data transfer may require users to pay a fee).
- Included employee self-service portals allow access to historical data, but do not allow changes to address or time entry.
- Simple reminder function alerts users of upcoming payroll date or tax payments.
- Accounting firms can private-label SurePayroll with their own logo, or allow clients to pay SurePayroll directly.
- Basic HR functionality provided; SurePayroll resells third-party tools for tasks like background checks, behavioral assessments & skill testing.

POTENTIAL LIMITATIONS
- Does not support companies with more than 100 employees.

SUMMARY & PRICING
SurePayroll is a good fit for businesses that have basic payroll needs and that desire a more paperless solution. It is also a good fit for accounting professionals looking for a resale opportunity.

Billing for accounting professionals can be sent directly to the accounting professional or to the client with a built-in markup. Pricing for services is based upon the number of payroll runs and employees, and includes all payroll processing, direct deposits and associated reporting requirements. A bi-weekly or semi-monthly payroll starts at a base fee of $30.95 plus $1.85 for each employee. These costs will be incurred for each payroll run. Annual W-2 processing costs are currently $40 per company plus $4.25 per employee.

PRODUCT DELIVERY METHODS:
- ☐ On-Premises
- ☑ SaaS
- ☐ Hosted by Vendor

★★★★☆	**BASIC SYSTEM FUNCTIONS**
★★★	**REPORTING & MONITORING**
★★★★☆	**INTEGRATION/ IMPORT/EXPORT**
★★★★☆	**HELP/SUPPORT**
★★★	**CLIENT SELF-SERVICE FEATURES**

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10318452

877-954-7873   **www.SurePayroll.com**

Cheque-Mate International, Inc. — Cheque-Mate Payroll Solutions

2011 OVERALL RATING ★★★★

BEST FIT
Payroll processors with large numbers of payroll clients who need an application with an inexpensive entry point but do not need general ledger (GL) integration.

STRENGTHS
- Includes support for multiple payroll frequencies, job costing & direct deposit.
- Call Calendar helps manage multiple priorities & shows upcoming client payroll runs.
- Time data importing supported from numerous applications, but exporting GL data to accounting software not supported.
- EFTPS & electronic tax filing available where supported by taxing authorities.

POTENTIAL LIMITATIONS
- Product supports state payroll taxes in only 38 states.
- Users cannot export GL data to any accounting software applications.

SUMMARY & PRICING
Insta-Pay is used by hundreds of accounting professionals, representing thousands of clients, and is designed for practices managing multiple employer clients. Current annual pricing for the software starts at $179 for a two-client payroll package and tops out at $895 for the unlimited package, which includes all available modules, functions and related support.

PRODUCT DELIVERY METHODS:
- ☑ On-Premises
- ☐ SaaS
- ☐ Hosted by Vendor

{FULL-SERVICE PROFESSIONAL}

★★★★☆	BASIC SYSTEM FUNCTIONS
★★★	REPORTING & MONITORING
★★★	INTEGRATION/ IMPORT/EXPORT
★★★	HELP/SUPPORT

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10318440

800-755-7846   www.chequemate.com

CompuPay — PayrollOnline

2011 OVERALL RATING ★★★★½

BEST FIT
Accountants or companies who need a web-based payroll application with outsourced tax filing and payment processing services, as well as those who need to manage payroll for multiple companies using a single login, but who do not have a full-time payroll or HR staff person.

STRENGTHS
- All-inclusive full-service payroll with support for unlimited users.
- Advanced features like employee multiple state withholding, certified payroll reporting, job cost reporting, custom reporting tools, benefit accrual calculation support, GL export & 401(k) reporting included in some versions.
- Offers HRIS tracking & reporting capabilities & a report writer.
- Employee self-service portal can be configured to allow pay stub & W-2 download, as well as online changes to address, dependents & W-4.

POTENTIAL LIMITATIONS
- Direct import of employee time data not supported without using Excel or text files.

SUMMARY & PRICING
PayrollOnline offers a fully comprehensive payroll solution that outsources all payments and reporting. Pricing is based on the edition (Basic, Advanced or Premier), the number of employees and the number of payroll runs. A 10-employee business requiring a biweekly payroll is currently priced at $60.95 per employee, per payroll run. This price includes all tax services, direct deposit and online employee access; online self-service HR functions cost extra.

{OUTSOURCED/REFERRAL}

PRODUCT DELIVERY METHODS:
- ☐ On-Premises
- ☑ SaaS
- ☐ Hosted by Vendor

★★★★☆	BASIC SYSTEM FUNCTIONS
★★★★☆	REPORTING & MONITORING
★★★★☆	INTEGRATION/IMPORT/EXPORT
★★★★☆	HELP/SUPPORT
★★★★☆	CLIENT SELF-SERVICE

CompuPay Innovation Pays

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10317505

877-729-6299   www.compupay.com

For more information, please go to cpapracticeadvisor.com/10058925

Thomson Reuters — Accounting CS Payroll

{FULL-SERVICE PROFESSIONAL}

2011 OVERALL RATING ★★★★½

BEST FIT
Accounting firms who use the Accounting CS application to work with clients on payroll and bookkeeping, as well as accounting professionals who use other CS Professional Suite tools for accounting, tax or document management.

STRENGTHS
- Uses combination of SaaS & hosted technologies to facilitate collaboration between clients & accounting professionals; integrates with Virtual Client Office & Virtual Office CS.
- Part of the Thomson Reuters CS Professional suite of applications, which offers a wide range of productivity solutions for accounting professionals who serve multiple clients.

- Existing payroll reports can be modified & custom reports created to meet almost every reporting need. Reports can be seamlessly exported to PDF, Excel, be made available to clients via client portals, or stored in FileCabinet CS.
- Payroll data can be imported from QuickBooks or Excel; time data can be brought in from Thomson Reuters web portals, time clock or Excel files.
- W-2s created with Accounting CS Payroll are automatically imported into client tax returns in UltraTax CS.

POTENTIAL LIMITATIONS
- Does not interface with accounting software other than Accounting CS, QuickBooks or Excel.

SUMMARY & PRICING
Accounting CS Payroll is an effective solution for accounting professionals who rely on the Thomson Reuters CS Professional Suite of products or who process a large volume of payroll clients. With the ability to quickly maneuver between client files and process multiple client files at once, Accounting CS Payroll is an attractive tool for accounting professionals. Pricing starts at $1,800 for an initial purchase and allows payroll processing for up to 20 client files. Additional payroll processing may be purchased in five-client bundles. Annual renewal prices for support and updates start at 20 percent of the original purchase price.

PRODUCT DELIVERY METHODS:
- ☑ On-Premises
- ☑ SaaS
- ☑ Hosted by Vendor

★★★★★	BASIC SYSTEM FUNCTIONS
★★★★★	REPORTING & MONITORING
★★★★☆	INTEGRATION/IMPORT/EXPORT
★★★★½	HELP/SUPPORT
★★★★★	CLIENT SELF-SERVICE

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10318483

800-968-8900   CS.ThomsonReuters.com

Paramount Software Solutions, Inc. — Crest Payroll

{PARTIALLY ASSISTED}

2011 OVERALL RATING ★★★★★

BEST FIT
Companies and firms who want a sophisticated, web-based payroll product that integrates with their existing websites, as well as organizations that use Paramount's other applications (eVault 365 DMS, Meridian MSP recruiting).

STRENGTHS
- Website integration feature, included employee portals & firm-specific branding makes even the smallest firm appear more professional.
- Custom batches of reports can be created & run at scheduled times & exported to different tabs in an Excel workbook file.

- Clients & remote offices can collaborate by entering data directly into the website or by entering data into a provided Excel sheet, which can be imported into the program.
- Supports wholesale payroll (accounting firm re-bills to client) or direct bill relationships with accountant involvement.

POTENTIAL LIMITATIONS
- Direct integration is provided for only QuickBooks, but data can be exported to Excel or CSV format & mapped into many applications.

SUMMARY & PRICING
With a user friendly and flexible interface as well as the ability to brand web views and reports with firm name and logo, Crest Payroll provides a number of service offerings in one easy-to-use package. Client billing can be accomplished by automatically drafting client bank accounts. Pricing is all-inclusive and is a flat fee regardless of features used or the number of states. Base pricing for each client file starts at $17 per month with a tiered discount pricing model based on the number of clients and average number of employees within those clients.

PRODUCT DELIVERY METHODS:
- ☐ On-Premises
- ☑ SaaS
- ☐ Hosted by Vendor

★★★★★	BASIC SYSTEM FUNCTIONS
★★★★★	REPORTING & MONITORING
★★★★★	INTEGRATION/IMPORT/EXPORT
★★★★☆	HELP/SUPPORT
★★★★★	CLIENT SELF-SERVICE

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10318466

888-400-1613   www.ParamountSoftware.com

CYMA Systems, Inc. — CYMA Payroll Software

{FULL-SERVICE PROFESSIONAL}

2011 OVERALL RATING ★★★★☆

BEST FIT
Firms or companies who use CYMA's integrated applications for write-up, nonprofit accounting or general ledger, as well as firms or companies who want an on-premises payroll application designed for quick data entry.

STRENGTHS
- Long history as a write-up application makes for quick & efficient data entry, with support for multiple clients & after-the-fact payroll.
- Custom reporting & modification of existing reports supported with Crystal Reports.

- Available add-ons provide employee self-service access to routine information changes & pay stubs, as well as HR management capabilities.
- Employee time keeping supported & supervisors can edit & approve data before it is released to payroll.

POTENTIAL LIMITATIONS
- Electronic payment transmission of federal & state payroll taxes not currently supported, but will be in next release.

SUMMARY & PRICING
CYMA Payroll Software provides a flexible payroll solution that may be configured for most business environments, from an accounting professional performing outsourced payroll for clients to a large professional employer organization. With the ability to process an unlimited number of companies, CYMA Payroll Software may prove to be a cost-effective payroll solution. Pricing is tiered based on the number of employees processed in the largest company file. Pricing for unlimited client files, each with 25 or fewer employees, starts at $695. The CYMA Employee Self Service module has a starting price of $495.

PRODUCT DELIVERY METHODS:
- ☑ On-Premises
- ☐ SaaS
- ☑ Hosted by Vendor

★★★★☆	BASIC SYSTEM FUNCTIONS
★★★★☆	REPORTING & MONITORING
★★★★☆	INTEGRATION/IMPORT/EXPORT
★★★★	HELP/SUPPORT
★★★★	CLIENT SELF-SERVICE FEATURES

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10318119

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The Blue Collar CPA

A small business is most productive when its owners are doing what they love. Whether a mechanic, baker, landscaper, restaurateur, childcare provider or a merchant, small business owners usually like what they do. That's what led them to their profession in the first place, along with their own drive, determination and the goal of working for themselves. Aside from accountants and financial professionals, however, few business entrepreneurs went into business so they could manage books, taxes, payroll and compliance.

Joe Madden knows this as well as anybody, which is why he's shaped his own small business around helping others succeed. Joe is the owner and founder

since built the firm around tax preparation and compliance, accounting/write-up, payroll and business consulting.
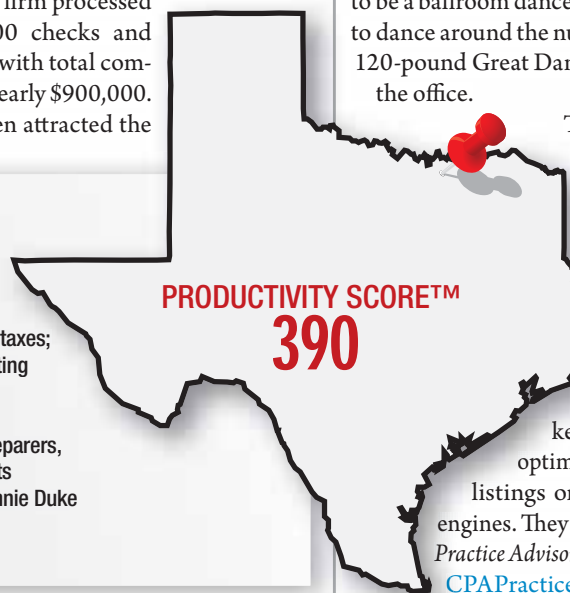
He's been especially successful at developing his payroll services, which the firm handles in its entirety, including impounding and full EFT management. While most of his payroll clients are also small, there are exceptions, including a glass manufacturer and a large church and school just across the Red River in Oklahoma. The firm processed more than 12,000 checks and deposits last year, with total combined payrolls of nearly $900,000. His model has even attracted the

niche audience, where he "evangelizes" good tax planning and preparation.

As many of his peers have done, Joe has taken advantage of best practices in the areas of going paperless, which his firm has been from nearly the beginning, as well as integrating optimized workflows. The three-person practice is made up of Joe, payroll manager Jill Wood, and Joe's mom Pamela, who serves as the client coordinator. "My mom used to be a ballroom dancer, so she is expertly qualified to dance around the numbers all day long." Bella, a 120-pound Great Dane, is also a common sight at the office.

The firm has multiple monitors at each workstation, and they use a fully integrated suite that includes their tax, accounting, payroll and practice management programs. With the help of a technology-focused client, the firm has also been proactive with its online marketing and search engine optimization, resulting in first-page listings on Google and other search engines. They earned a score of 390 on *CPA Practice Advisor*'s Productivity Survey (www.CPAPracticeAdvisor.com/productivity-survey), a free web-based tool that helps firms assess their workflow and technology usage, and provides benchmarking against similarly sized practices.

Joseph E. Madden, CPA

Firm: Joseph E. Madden, CPA

LOCATION: Denison, Texas

WEBSITE: www.josephmadden.com

PRACTICE SPECIALTIES: Individual & business taxation; Clergy taxes; Payroll; Small city accounting; Consulting

EDUCATION: S.E. Oklahoma State University

PROFESSIONAL ASSOCIATIONS: AICPA, Texas Society of CPAs, National Association of Tax Preparers, National Society of Accountants

MOST RECENT BOOK READ: "Decide to Play Great Poker," by Annie Duke

SOCIAL NETWORKING: Blog: www.josephmadden.com/blog
Facebook: www.facebook.com/joecpa

PRODUCTIVITY SCORE™
390

of Joseph E. Madden, CPA (www.josephmadden.com) in Denison, Texas, a practice that focuses on what he considers the real backbone of our economy: the smallest businesses where the owners get their hands dirty along with their workers … if there even are any other employees.

"Denison has plenty of larger corporations and other entities, but we try to help the small guys," said Joe. "The shade tree mechanic, the plumber and other blue collar workers. They're the ones who would rather be doing real work instead of trying to figure out their finances, and that means they also need the help most of all." He says that the key is finding out what each individual client wants to know, especially in helping them really understand their cash flow.

Joe started his firm in 2003, but was already well-known in the business community. He had worked for one of the largest firms in north Texas, where he mostly handled audits for nonprofits and governmental entities. He also partnered with another area accountant for a few years, and has

attention of large firms across the country who would like to duplicate his success.

Joe has also developed a less common specialty, but one that he's found professionally and personally rewarding. He manages the income tax returns for approximately 20 pastors, some who've even moved out of state but continue to rely on his expert advice when it comes to clergy members, from special housing allowances, self-employment taxes and other issues. He occasionally even holds seminars for this

> **"THE SHADE TREE MECHANIC, THE PLUMBER AND OTHER BLUE COLLAR WORKERS. THEY'RE THE ONES WHO WOULD RATHER BE DOING REAL WORK INSTEAD OF TRYING TO FIGURE OUT THEIR FINANCES, AND THAT MEANS THEY ALSO NEED THE HELP MOST OF ALL."**

Another somewhat peculiar specialty, but one that Joe thinks will become more common in the near future, is his work with small governments. He currently serves as a bookkeeper for the Texas cities of Van Alstyne and Southmayd, working in their offices a couple of times per week, consulting and assisting their city secretaries on finances. For Southmayd, he also reports on city finances to their council. He notes that new audit pronouncements are driving small towns and cities to use CPAs, since they rarely have a qualified accounting professional on staff, which can result in unwanted findings reflected on their audits.

Joe's small business work; discounted rates for active duty military, police and firefighters; his specialties with pastors and small local governments; as well as his involvement on the city of Denison's Historic Preservation Board have earned his practice the title of "Best Accountant" in the *Denison Herald Democrat*'s annual "Best of Texoma" reader voting.

Bella (office mascot), Pamela Madden (client coordinator) Joe Madden (owner & founder), Jill Wood (payroll manager)

Joe and his wife Tracy moved to Texas from Oklahoma, where he'd attended Southeastern Oklahoma State University. Tracy attended the University of Oklahoma's Health Sciences Center, and is now the facilities administrator at the Davita Dialysis center in Denison. Prior to college, Joe served in the U.S. Navy aboard the frigate USS Ouellet.

Joe and Tracy have also found an alternative use for the firm's office after hours. "Tracy and I like to play poker, and our office is a great location to host occasional tournaments. The building is more than 100 years old and has huge wide open spaces." The most recent tournament had nearly 30 players. They also participate in some charity games and attend other tournaments, though he readily admits that Tracy is the better player.

The couple has two daughters (10 and 14), and when not attending their events, such as cheerleading, the family loves to get out for extended road trips. "We like to just take our time, meander a little and stay a few days in some places with no real schedule or set plans."

Last year, they drove to Chicago via Kansas City and St. Louis, with a uniquely inspired theme. "It was kind of like reliving the TV show, "Man v. Food," since we went to several of the restaurants featured on the show." They visited about six or seven such restaurants during that trip, but Joe notes that he didn't try any of the eating challenges for which the show is famous. They're already starting to plan their next road trip — destination Florida. The family attends Sherman Bible Church (www.shermanbible.com). ●

What We've Learned

(an interesting stat)
PRODUCTIVITY SCORE
AVERAGES

▶ **Regarding wireless in the office:** Over one-third of firms indicate that they provide wireless access in their offices. Unfortunately, 10% don't seem to encrypt and/or hide the SSID.

WHERE DOES YOUR FIRM STAND?

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CPA | Practice Advisor
Today's Technology for Tomorrow's Firm

How Commitment & Change Go Hand in Hand

Jim Baker

Mr. Baker is publisher of CPA Practice Advisor. He has multiple years experience developing integrated B2B advertising solutions across print, digital, mobile and custom media. He can be reached at jim.baker@cpapractice advisor.com or 800-456-0864 ext. 2107.

A lot has been written about the need for accountants to rethink how they run their practices. In the July issue of *CPA Practice Advisor*, Executive Editor Darren Root wrote, "It's time to challenge yourself and really think about providing and delivering services that clients want." I would argue that the same holds true for companies who serve accountants. As customers, you must challenge vendors to find better ways to serve your firm's needs and provide the necessary tools to meet today's challenges. *CPA Practice Advisor* has taken this to heart.

Over the past eight months, *CPA Practice Advisor* has undergone monumental changes, all geared at better serving the accounting community and, in particular, our loyal readers. The publication was rebranded in January from *The CPA Technology Advisor* to *CPA Practice Advisor*. In February, we held our first Thought Leader Symposium. In May, we relaunched our website, and in July we added Jason Blumer, CPA.CITP to our impressive lineup of columnists.

Changing the publication's name was a logical choice. Technology is omnipresent. There is little we do that does not involve some type of technology. Computers, the internet, smartphones, tablets, apps, software and social media are such a large part of modern life that most people couldn't function without some or perhaps all of these technologies. The challenge for you, as practitioners, is to determine which tools and processes fit best with your practice. *CPA Practice Advisor* is dedicated to providing that information and being a true advisor. To accomplish that mission, we must be honest, knowledgeable, dependable, innovative and collaborative in our approach.

CPA Practice Advisor's Thought Leader Symposium, which was held in February 2011, provided an opportunity for 25 of the top minds in tax and accounting to get together and discuss several pressing issues. Event sponsors Thomson Reuters, CCH, a Wolters Kluwer business and Sage had the opportunity to present their visions for serving accountants and receive feedback from the thought leaders. Both sides walked away from the symposium energized and with a better understanding of the current state of the profession. Plans are already underway to build on the great foundation laid at this first event.

Perhaps the greatest investment of our time and resources has gone towards the re-launch of www.CPA PracticeAdvisor.com. It was well worth the effort. Improved navigation, enhanced content organization, more video, better search capabilities and a new weekly email newsletter provide visitors with the premier website for product reviews and insight from some of the most respected individuals in the tax and accounting profession. If you haven't already been to the new site, I encourage you to go to www. CPAPracticeAdvisor.com today, register and become a regular visitor.

CPA Practice Advisor has invested heavily in putting together a team of respected contributors who are leaders in the profession. Executive editor Darren Root, CPA.CITP, managing editor Melody Steelman, and editors Isaac O'Bannon and Brian Tankersley, CPA.CITP, along with our all-star columnists, provide insight you won't find anywhere else. The addition of Jason Blumer brings youth, excitement and a fresh way of looking at the profession. Jason has been recognized as one of *CPA Practice Advisor*'s 40 Under 40 and hosts a monthly podcast, the THRIVEcast along with co-host Greg Kyte, CPA. Jason told me that "the THRIVEcast is our warped and dysfunctional spin on the cloud, business, innovation, practice management and more." Jason's first column for *CPA Practice Advisor* is on page 18 of this issue.

We would love to hear from you regarding the changes we have made. Your feedback is the best way for us to know what is important to you and discover more ways that we can help you manage and grow your practice. Contact me anytime at Jim.Baker@ CPAPracticeAdvisor.com or 800-456-0864 ext. 2107. ●

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~ *Corry Riley, Brookville, PA*

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~ *Kristi Dolan, Lynchburg, VA*

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- ✓ And much more

Highest Rated! ★★★★★
CPA Technology Advisor, September 2009

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