Technology Infrastructure Needed for a Leading CAS Practice

Workshop Tool

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Technology Infrastructure Needed for a Leading Client Accounting Services Practice

With all of the technology “gadgets” and solutions on the market these days, it can be tough to know what options are most important for your Client Accounting and Advisory practice. The following is a list of technology features and solutions you will want to consider as you grow your CAS division. This list does not include accounting (Intacct®) or other integrated workflow software solutions. It is instead a list of the supporting tools, gadgets, and system requirements that you’ll want to consider for your firm, including technology that is important to consider if you have staff that work remotely part or full time.

- Windows 7 Professional Operating System is highly recommended as many SaaS solutions have virtual/mapped drive options that work best in a Windows 7 environment.
- Laptops with office and home docking stations are ideal for allowing flexible work opportunities and easily providing for multiple monitors, printers, scanners, etc., to be installed in both environments.
- Wired or wireless PC-compatible headset for internet phone calls and web meetings
- Adobe Acrobat Pro highly recommended
- Document sharing/secure file exchange application such as ShareFile, SmartVault or other recommended
- Scanner – portable scanner that will duplex is ideal for both light office use and travel – examples are Fujitsu ScanSnap 1100 (color but does not duplex), ScanSnap 1300 (will duplex), or Canon P150. AICPA Members can receive discounts on HP Scanners and other technology solutions.
- Color laser printer
- e-fax® account or equivalent
- GoToMeeting and GoToWebinar, or Webex, or other similar meeting solutions (ideally with video conferencing capability) is a critical resource. It is recommended that firms consider a corporate account that allows (with several industry products) for:
  - Custom branding
  - An administrator role with the ability to add/remove individual firm users so that multiple staff can hold concurrent meetings
  - The ability to add a “widget” to the firm website so that clients can log in to a meeting right from the firm website if given a session/meeting ID
  - Usage and other account reporting

Each solution is slightly different, so it’s best to compare the options and consider what is best for your firm.

- Telephone system options
  - VOIP system with “follow me” features
  - Grasshopper®
Skype Business (with online phone number, call forwarding, voicemail and video calling options). Compatible with many of today’s smartphones.

- Redundant internet connection options
- Webcam (often built in to new laptops)

Recommended:

- Smartphone
- iPad

If staff will be telecommuting
- Landline (still important for high-quality client telephone calls)
- Redundant internet connection options
- Battery backups for computers, additional charged batteries for laptops
- Webcam