

AICPA conferences 2008 TECH Conference  
June 10, 2008 – Las Vegas, Nevada

# Technology Management for Small Firms

Presented by  
Roman H. Kepczyk, CPA, CITP

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## Today's Agenda:

- CPA Firm IT Environment
- ExSTRM Planning Process
  - IT Team Staffing and Training
  - Determining Your Firm Baseline
  - Plan and Budget Development
- Core IT Initiatives

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## CPA Firm IT Environment

- Ever increasing rate of change
- Explosion of information and file sizes
- Ubiquitous connection options
- System access and resiliency expected
- Security critical but underappreciated priority
- Dealing with personnel displacement

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### ExSTRM and Your IT Team

<p>&gt; Ex _____</p> <p>&gt; S _____</p> <p>&gt; T _____</p> <p>&gt; R _____</p> <p>&gt; M _____</p>	<p>&gt; Your ExSTRM <b>Roles</b></p> <ul style="list-style-type: none"><li>· Visionary Director</li><li>· Firm Administrator</li><li>· Internal IT Support</li><li>· Departmental Champions</li><li>· External Integrator</li><li>· Outsourced Expertise</li></ul>
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### ExSTRM IT Team Management

- > Staffing Benchmarks
  - 1 FTE for every 25 workstations to first 100
  - 1 FTE for every 50 workstations after 100
  - Other Industries?
- > Allocating Responsibility in Small Firms
- > Resource: Salary.com

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### IT Training Statistics

- Untrained worker consumes 3-6 time more IT support than trained worker.
- Untrained workers take 2-6 times longer to get to the same level of proficiency.
- What percentage of the day do your IT people spend on issues that could have been mitigated with better training?

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### ExSTRM Internal Training

- Application Champion List
- Needs Assessment
- Training Curriculum
- Best Practices Documentation
- Resources: [itpna.com/search.htm](http://itpna.com/search.htm)

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### ExSTRM IT Training

- Published Resources and Webinars
  - CPA Technology Advisor
  - Accounting Technology
  - MIT/ITPNA ExSTRM Vision
- Association/Peer Networking
- Industry Conferences

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### ExSTRM: Determining Baseline

- Firm Objectives/Strategic Plan (Succession)
- Understand IT Plan, Project Status
- IT Support Database, External Call Logs
- IT Budget/Previous Year's Expenditures
- Resource: ITPNA Inventory Template

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### Plan Development

- Departmental Interviews
- IT Infrastructure Interview
- Prioritize Projects with ROI in mind
  - Immediate Return: 1 Person/4 Hours
  - Project: Weekly Action Steps/Accountability
- Resource: ITPNA ExSTRM Interview Form

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### Budget Development

- Capital Budget is becoming IT Budget
- IT Benchmarks
  - \$6,500-\$8,000/person
  - 5% for \$125,000/person production
- Resource: ITPNA Budget Template

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### Core IT Initiatives

- Digitalization of all Information:
  - Capture at Root Source
    - Fax, Voice, Email, Portal
    - Scanner, USB Fob/PDF
  - Document/Knowledge Management
  - Focus on Workflow Integratoin

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### Core IT Initiatives

➤ Communications:

- Redundant Internet Connectivity
- Remote Access Tools:
  - PCDs, Laptop Wireless
  - XP Remote, GoToMyPC
  - Web-Based Applications

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### Core IT Initiatives

➤ Security and Business Continuation:

- Access: Firewalls, Passwords, Physical
- Protection: Anti-Virus, Anti-Spam, Encryption
- Data Archival and Backup
- Immediate Response and Disaster Plan
- Resources: AICPA, TSIF, GRC ShieldsUp!

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### Questions?

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