



Tech Trends: What To Know...

AND WHAT YOU CAN DO
ABOUT IT.

IMA AKRON CHAPTER
MEETING

SEPTEMBER 23, 2020

“Being informed is a virtue. It helps us make better decisions and encourages us to take action..”

- SETH GODIN

Agenda

Introduction

Trends & Tech Overview

“ADAM” – Analytics, Digital, Automation,
Mobile

“What Can I Do?”

Wrap Up

INTRODUCTION

Intro - Learning Objectives

Upon completion of this session, participants will be able to:

1. Understand the significant technology trends impacting the accounting profession
2. Understand a framework for monitoring and awareness of technology changes
3. Develop a personal knowledge management (“PKM”) system for use by individuals or their organization
4. Apply the “ALL” (Awareness, Learn, Leverage) process to developing relevant skills

Introduction

- ❑ *“Blistering change & widespread disruption”* – recent AICPA email characterizing the current state of the profession!
- ❑ The profession has started to adjust...
- ❑ But the opportunity keeps coming! (and COVID-19 has accelerated this change...)

I'm Having déjà vu...



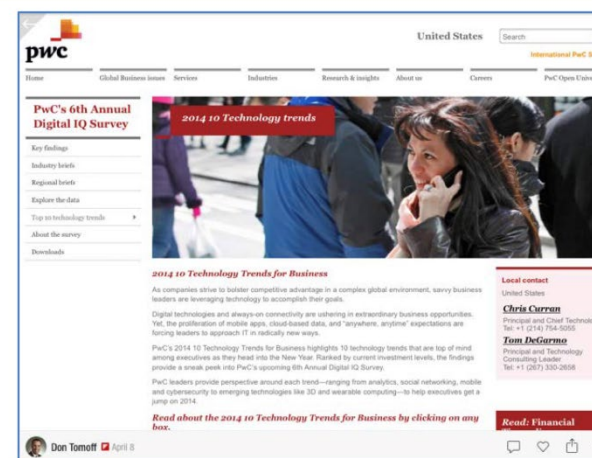
Accountants and Technology: Converging Trends + Technology = ~~Opportunity~~ Risk?

IMA Meonske Conference
April 25, 2014

April 2014...

*Analytics, social,
mobile...*

Disruption/Innovation



PwC's 2014 10 Technology Trends for Business highlights 10 technology trends that are top of mind among executives as they head into the New Year (Ranked by current investment levels).

2014 10 Technology trends

<http://www.pwc.com/us/en/advisory/digital-iq-survey/2014-10-technology-trends.jhtml>

Top Three?

- Business Analytics (44%)
- Socially enabled business processes (41%)
- Mobile customer engagement (39%)

TRENDS & TECH OVERVIEW

Top trends

August 4, 2020

1. Big Data
2. Increased Computing Power
3. Artificial Intelligence
4. Intelligence of Things
5. Autonomous Robots
6. Blockchain



The 6 Biggest Technology Trends In Accounting and Finance

Future Trends: Tech & Business
The way we manage, lead and work in modern organisations is evolving and changing constantly.
Weekly newsletter

90,028 subscribers **Subscribed**

The 6 Biggest Technology Trends In Accounting and Finance

Published on August 4, 2020

Bernard Marr  **fluencer**
Internationally best-selling author, keynote speaker, futurist, and strategic business & technology advisor

889 articles

The explosion in data that has launched the Fourth Industrial Revolution a

 **Messaging**  

<https://www.linkedin.com/pulse/6-biggest-technology-trends-accounting-finance-bernard-marr>

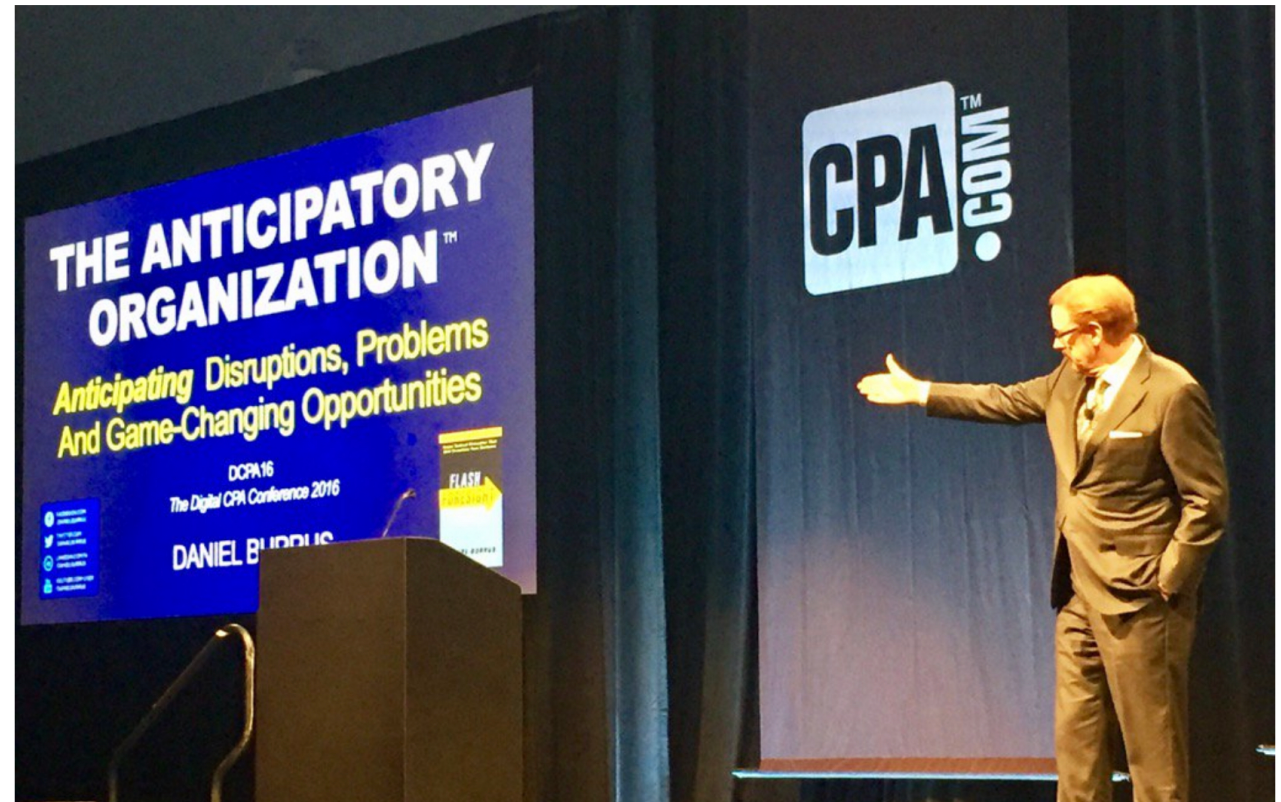
Top trends

July 14, 2020

1. Big Data
2. Artificial Intelligence
3. Cloud Computing
4. RPA
5. Mobile Apps
6. Cybersecurity...
7. Continues...

Big Data, Artificial Intelligence, RPA and Cloud top the list of profession's technology hard trends for 2020 | Business Learning Institute | BLI

blionline.org · by Tom Hood on July 14, 2020



<https://blionline.org/big-data-artificial-intelligence-rpa-and-cloud-top-the-list-of-professions-technology-hard-trends-for-2020/>

SOUND
FAMILIAR?



HARD TRENDS PROFITABILITY EXPONENTIAL TECHNOLOGIES
FUTURE OF AUDIT **LEARNING** **BIG DATA**
PROJECT MANAGEMENT CUSTOMER **BLOCKCHAIN**
WORKFLOW EXPERIENCE **DOING MORE WITH LESS**
EMPLOYEE TALENT RETENTION
ENGAGEMENT NOT ENOUGH TIME
COMPETITION **TRANSFORMATION**
INNOVATION SHIFTING ACCOUNTABILITY
MARKETS
NEW BUSINESS **REACTIVE VS PROACTIVE**
MODELS CHANGING STANDARDS
REGULATIONS

Warnings For Our Profession



*How much
has
actually
changed?*

Capitalize on Disruption?

“Accountants should be preparing now for advanced technologies and other factors that are poised to disrupt the profession.”

FEATURE / TECHNOLOGY

October 2019 Journal of Accountancy

What CPAs must do to capitalize on disruption

Accountants should be preparing now for advanced technologies and other factors that are poised to disrupt the profession.

By Amy Vetter, CPA/CITP, CGMA

7 hours 27 minutes ago



A Little More Emphasis...

*“Accountants should **MUST** be preparing now for advanced technologies and other factors that are poised to disrupt the profession.”*

FEATURE / TECHNOLOGY

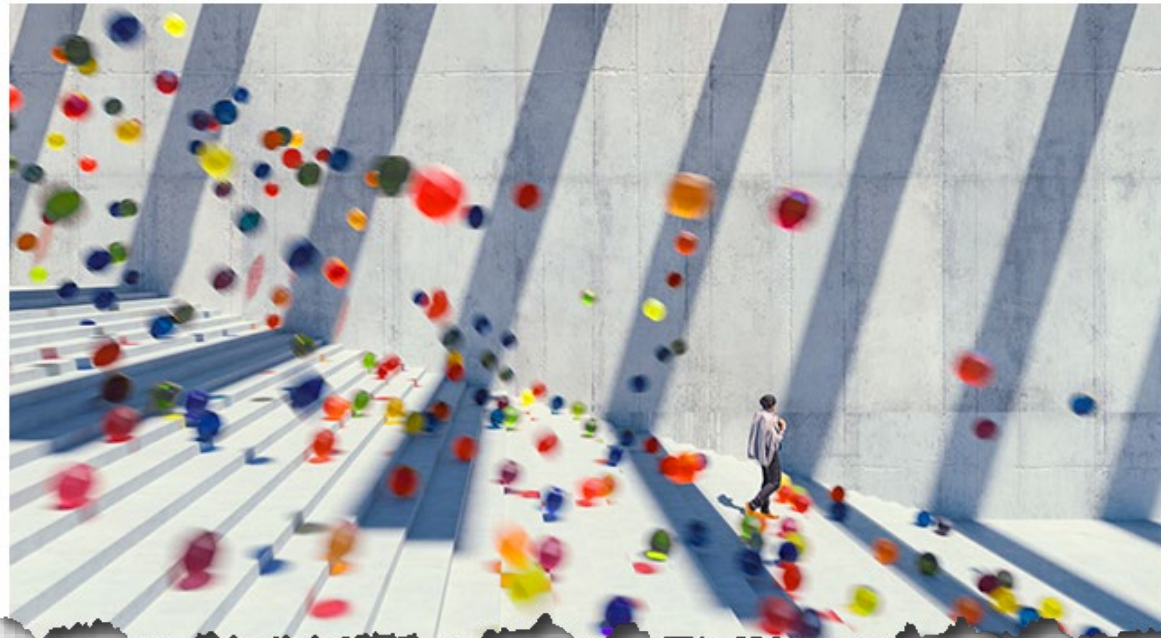
October 2019 Journal of Accountancy

What CPAs must do to capitalize on disruption

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7 hours 27 minutes ago



Amy Vetter – JOA Thoughts

- ❑ *“...clients may soon be clamoring for advisory services and services we haven't even thought of yet.”*
- ❑ *“...large enterprises like the Big Four are investing untold time and resources into disruptive processes.”*
- ❑ *“To prepare for the future, you must step back from the way you do things today and look at your business from a new perspective. You will need to brainstorm new ideas.”*
- ❑ *“What new service could you launch to make an old service obsolete? Assume in this question that your existing skills and processes are no longer relevant in three to five years.”*

Anticipate Disruption?

Now What - Future-ready Lessons



87% anticipate disruption, but only 44% feel that their organization is adequately preparing...

Top Technology Trends Impacting the Profession in Next Three Years

1. Artificial intelligence, machine learning, and cognitive computing in audit and tax
2. Big Data and high-speed data analytics
3. Adaptive and predictive cybersecurity
4. Virtualization and automation of processes and services (RPA)
5. Mobile apps for business process innovation
6. Blockchains and cryptocurrency
7. Advanced cloud computing
8. Smarter smartphones and tablets drive mobile process automation
9. Virtualization of desktops, storage, applications, and networking
10. Social business applications



Source: 2018 Top technology Trends – Burrus Research
BLI-MACPA Research over one thousand finance and accounting
professionals globally

Tech-Enabled Disruption – Four Broad Categories

- ☐ **A**NALYTICS
- ☐ **D**IGITAL
- ☐ **A**UTOMATION
- ☐ **M**OBILE

“ADAM”

“ADAM” Is A Framework

- ☐ **A** – “Analytics” – Small Data, Big Data
- ☐ **D** – “Digital” – Cloud, Social, Digital workflow, Collaboration, #thinkingdifferently
- ☐ **A** – “Automation” – AI, RPA, Blockchain...
- ☐ **M** – “Mobile” – Mobile business processes, mobile apps

Polling Question #1

Many technology trends are impacting the accounting profession.
The current top trend identified in this presentation is:

1. Artificial Intelligence
2. Robotic process automation (“RPA”)
3. Cloud Computing
4. Data Analytics

“A.D.A.M.”

ANALYTICS, DIGITAL, AUTOMATION & MOBILE

Analytics

Time Spent on Data

0%

of time in top performing finance functions
is devoted to data analysis



2013

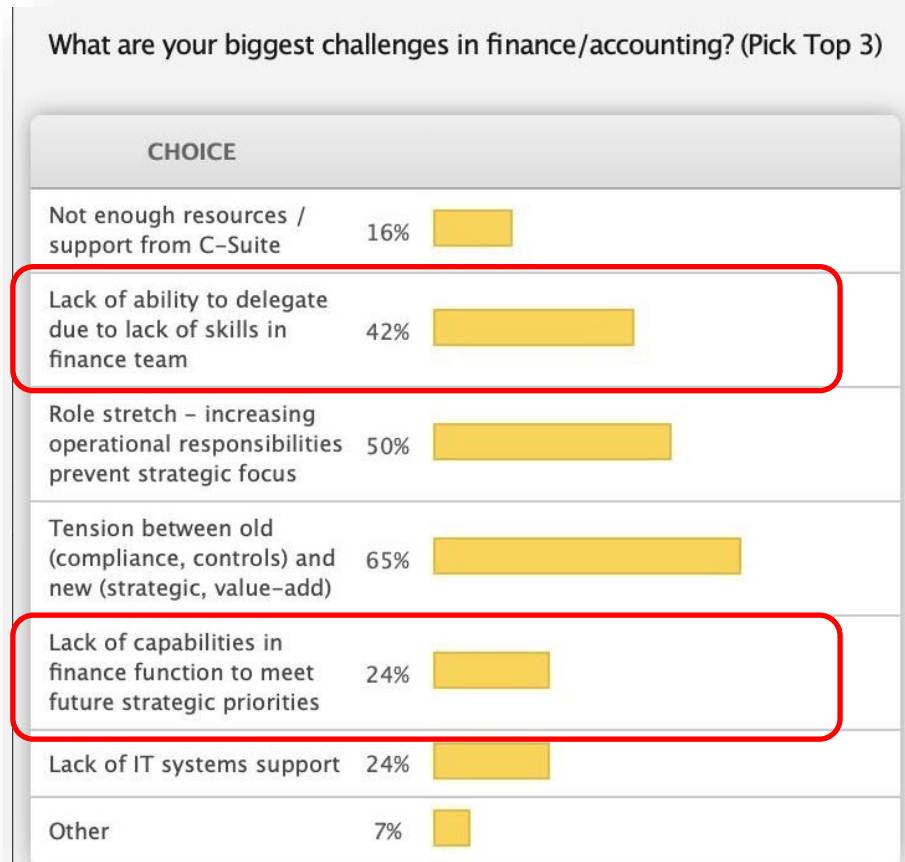
2018

Top quartile
Median

Source: PwC, Finance Effectiveness Benchmarking, August 2019.
Percent of staff time spent on analysis vs. data gathering in finance function roles.

**PwC, Finance
Effectiveness
Benchmarking
Study, August
2019**

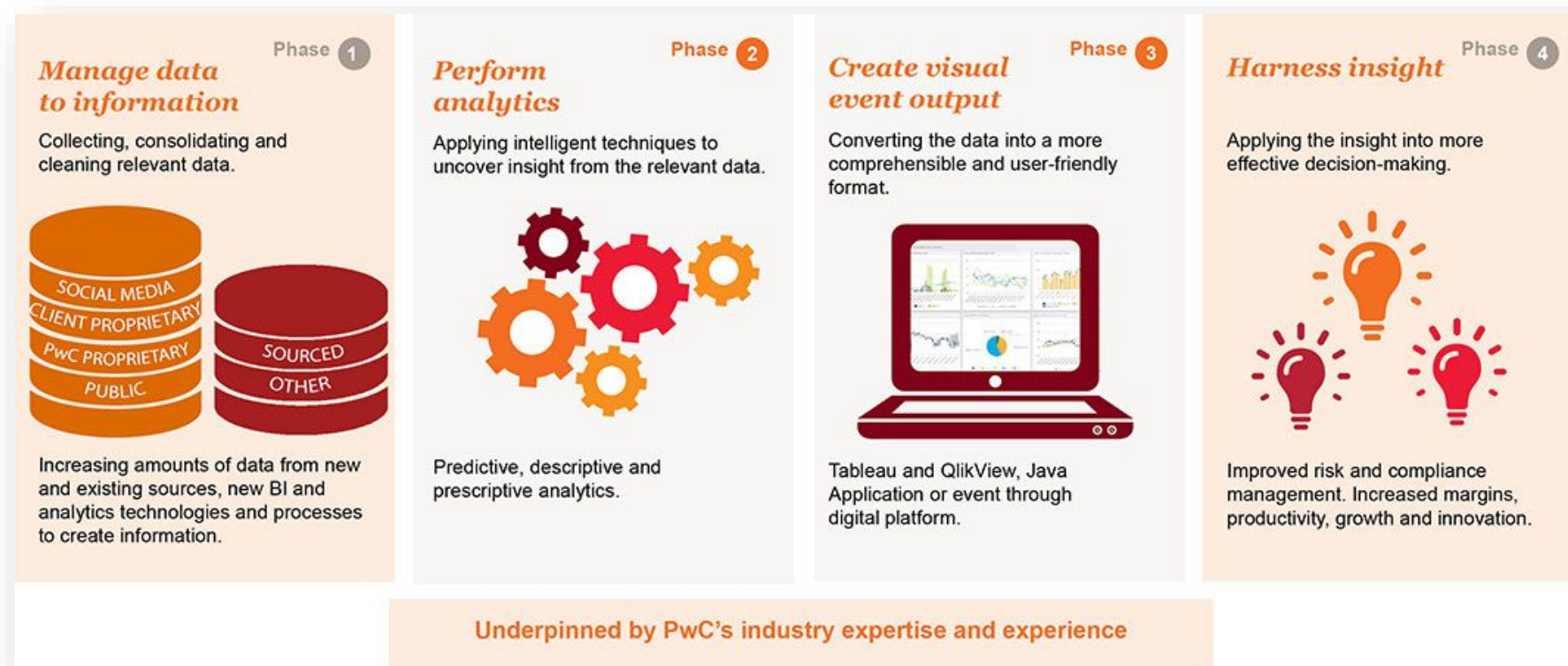
Biggest Challenges (MACPA/BLI Survey)?



*“A common factor behind the staffing and talent shortage is the need to find professionals with a mix of financial and **data management skills**. That accounts for the growing trend to hire consultants for certain projects.” - [AccountingToday](#)*

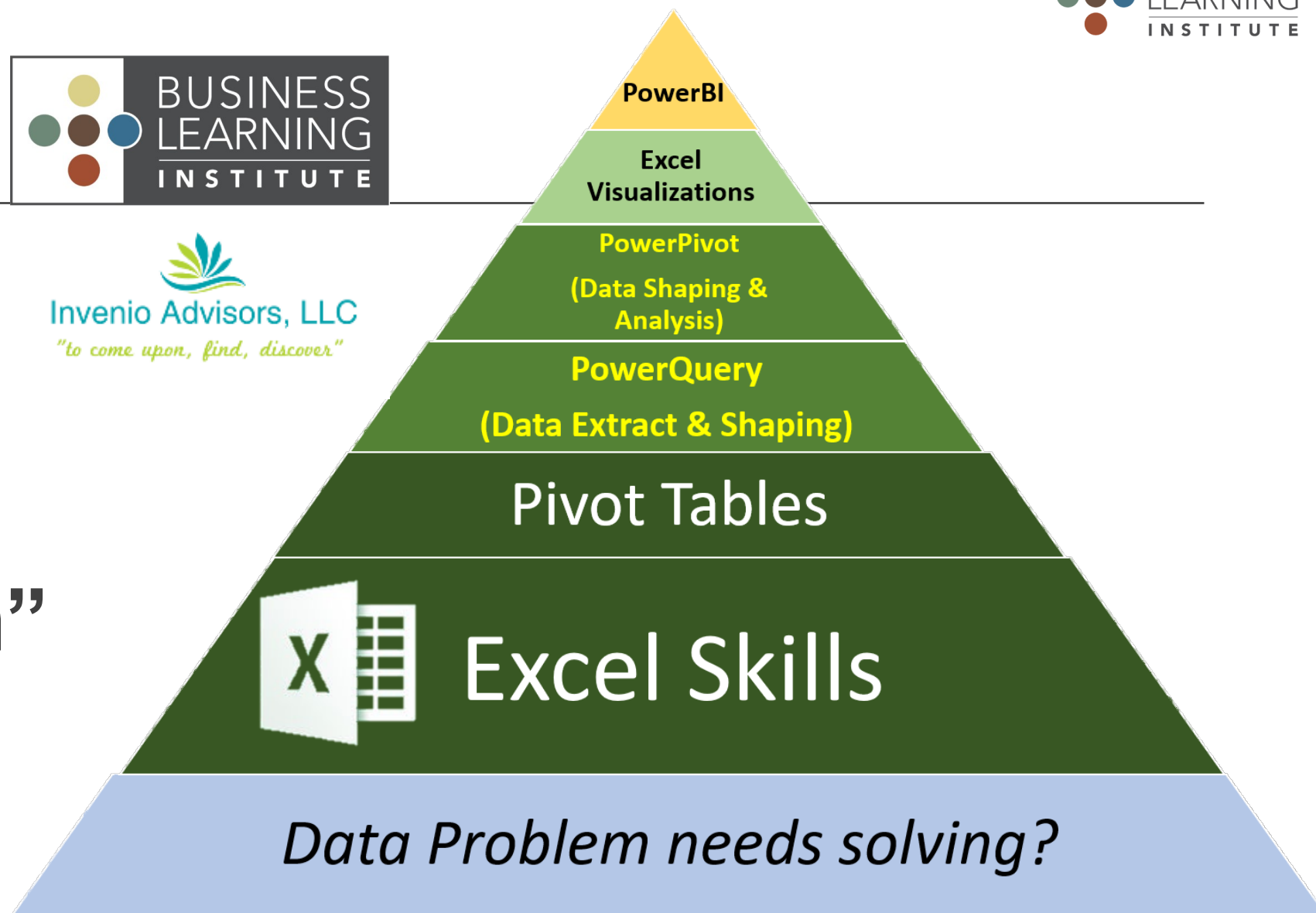


Data Analytics



Source: PwC Twitter [@MikeQuindazzi](#)

Microsoft's Analytics "Ecosystem"



Digital

What Is Digital?

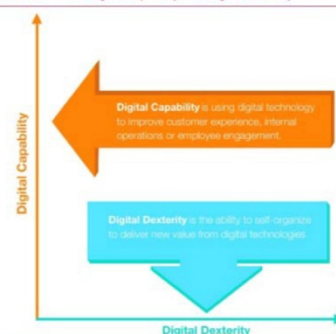
What Digital Means...

Access the Articles /
Whitepapers:
<http://bit.ly/whatdigitalmeans>

Digital capability – using digital technology to improve customer experience, internal operations or employee engagement



Figure 3: A Digital Organization Combines Digital Capability with Digital Dexterity



Julia, D., Puram, A., Westerman, G. and Bonnet, D. "Becoming a Digital Organization: The Journey to Digital Dexterity" (September, 2015).

2

"...using digital technology to improve customer experience, internal operations or employee engagement."

What Digital Means...



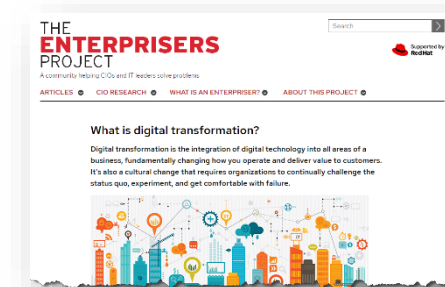
FIGURE 5: Results from our research suggest companies should rethink conventional wisdom and consider the fact that the majority of their employees across age groups want to work for a digitally enabled organization.

Age	Very important	Somewhat important
18-24	85%	15%
25-34	85%	15%
35-44	85%	15%
45-54	85%	15%
55-64	85%	15%
65+	85%	15%

1

<http://bit.ly/whatdigitalmeans>

What Is Digital?



“Digital transformation is the integration of digital technology into all areas of a business, **fundamentally changing how you operate and deliver value to customers**. It's also a cultural change that requires organizations to continually challenge the status quo, experiment, and get comfortable with failure.”

<https://enterprisersproject.com/what-is-digital-transformation>



What Is Digital?

A note: Some leaders feel the very term “digital transformation” has become so widely used, so broad, that it has become *unhelpful*. You may not love the term. But love it or not, ***the business mandates*** behind the term – to rethink old operating models, to experiment more, to become more agile in your ability to respond to customers and rivals – ***aren't going anywhere.***

Simple Example? Email!

Communication modes have changed? Is email still your default?

Today, communication happens over social (Facebook, LinkedIn, Snap, Instagram, Twitter, etc.), collaboration tools (MS Teams, Slack), texting, etc.

Are you communicating how your clients / staff prefer?

Automation

Finance Automation Potential

**PwC, Finance
Effectiveness
Benchmarking
Study, August
2019**

30-40% of time can be reduced with finance automation and behavior change

Automation potential ◀──▶ Wasted time

Management reporting

Tax accounting

Credit management

General accounting

Billing

Budget & forecasting

Business analysis

Financial reporting

Accounts payable

Payroll

Accounts receivable

Finance strategy & planning

<https://www.pwc.com/us/en/services/consulting/finance/finance-effectiveness-benchmark-study/process.html>

Source: PwC, Finance Effectiveness Benchmarking, August 2019.

Finance Automation Potential

**PwC, Finance
Effectiveness
Benchmarking
Study, August
2019**

30-40% of time can be reduced with finance automation and behavior change

Automation potential ← → Wasted time

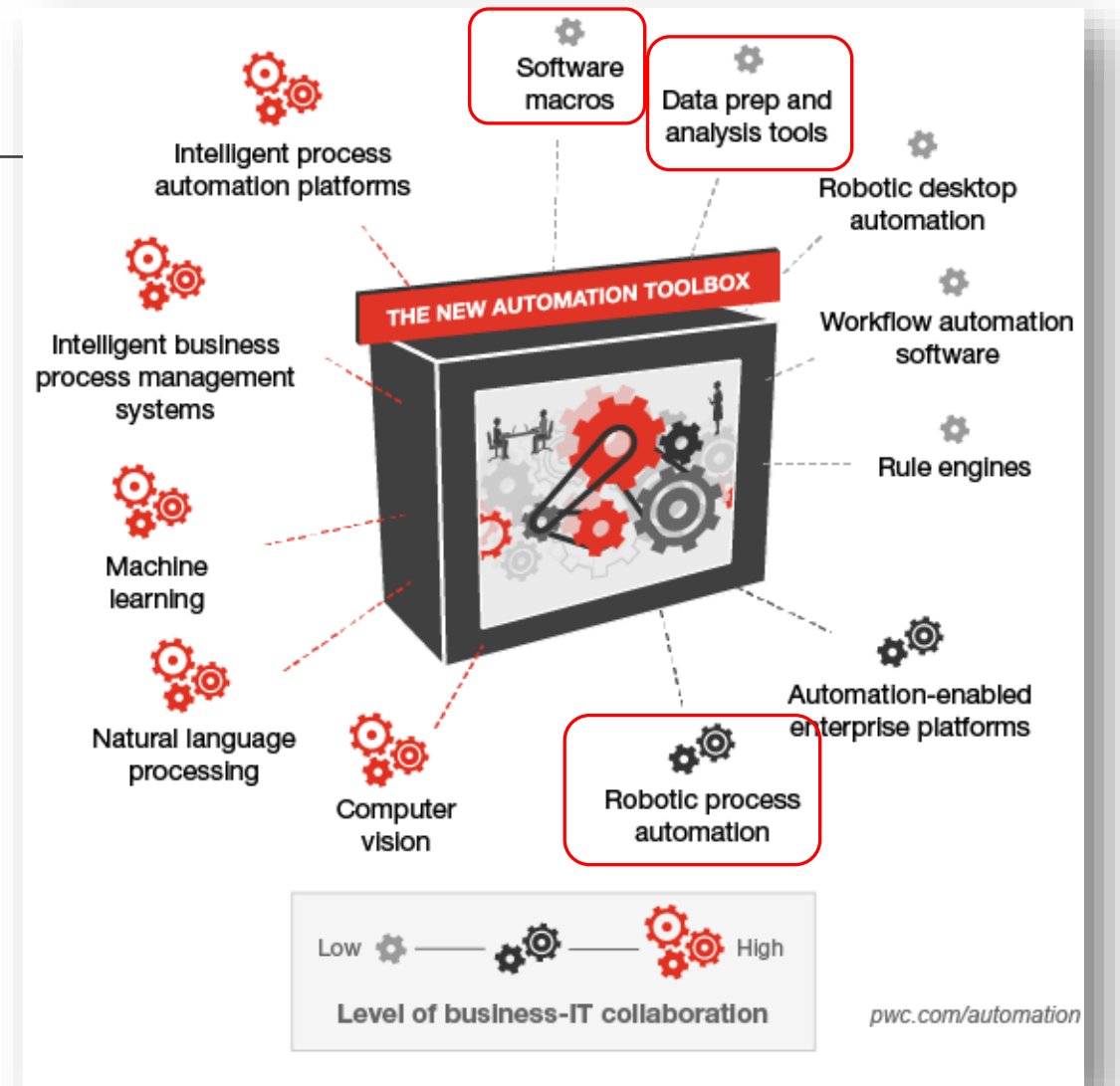


Source: PwC, Finance Effectiveness Benchmarking, August 2019.

<https://www.pwc.com/us/en/services/consulting/finance/finance-effectiveness-benchmark-study/process.html>

Automation Toolbox

<https://www.pwc.com/automation>



Automation Toolbox

The new automation toolbox

Level of business-IT collaboration Low  —  —  High



Data prep and analysis tools

Automatically extract and integrate data from disparate sources, such as combining spreadsheet and ERP for analysis.



Robotic process automation

Automates repetitive activities across multiple systems via software robots that replicate a user's workflow.



Machine learning

Trained algorithms that make decisions as part of an automated process flow, such as selecting the optimal supplier at a given point in time.



Natural language processing

Algorithms that process speech or text input, such as a chatbot that interprets customer queries.



Computer vision

Automates capture of image or document information, such as reading forms.



Intelligent process automation platforms

Identify patterns and learn over time to optimize automated workflows.



Intelligent business process management systems

Orchestrate work allocation between humans and machines across multiple automation technologies.



Automation-enabled enterprise platforms

Extend processes via built-in RPA and AI capabilities.



Rule engines

Define the business rules that govern task or processes.



Workflow automation software

Automates workflows, often via a drag-and-drop interface, such as managing IT support tickets.



Robotic desktop automation

Automates repetitive tasks across desktop applications, such as validating customer data in a CRM system.



Software macros

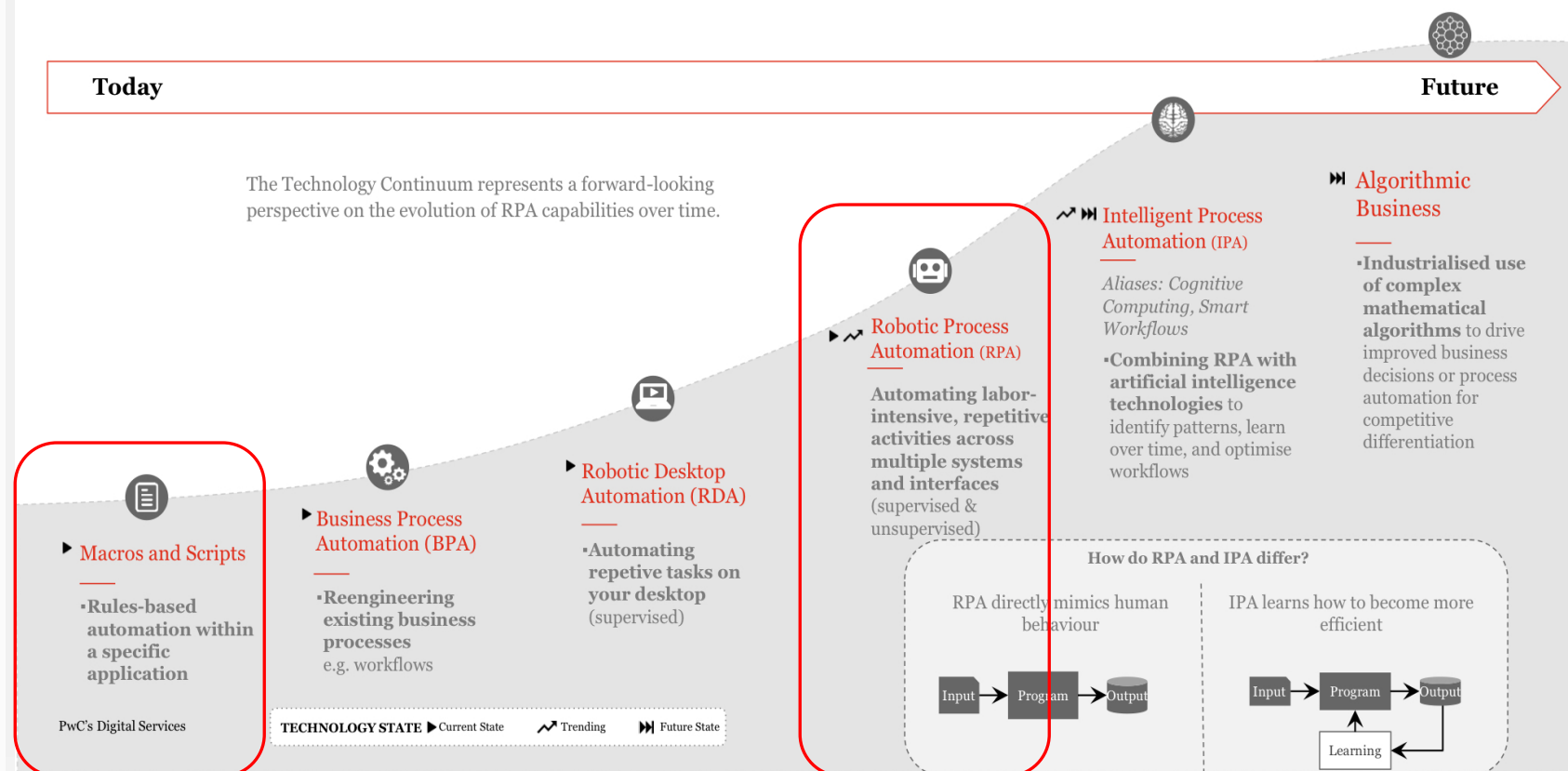
Automate rule-based activities within a single application, such as performing spreadsheet calculations.

<https://www.pwc.com/automation>

Automation Spectrum

[Download PwC Whitepaper – RPA Automation](#)

Where does RPA sit on the automation spectrum?

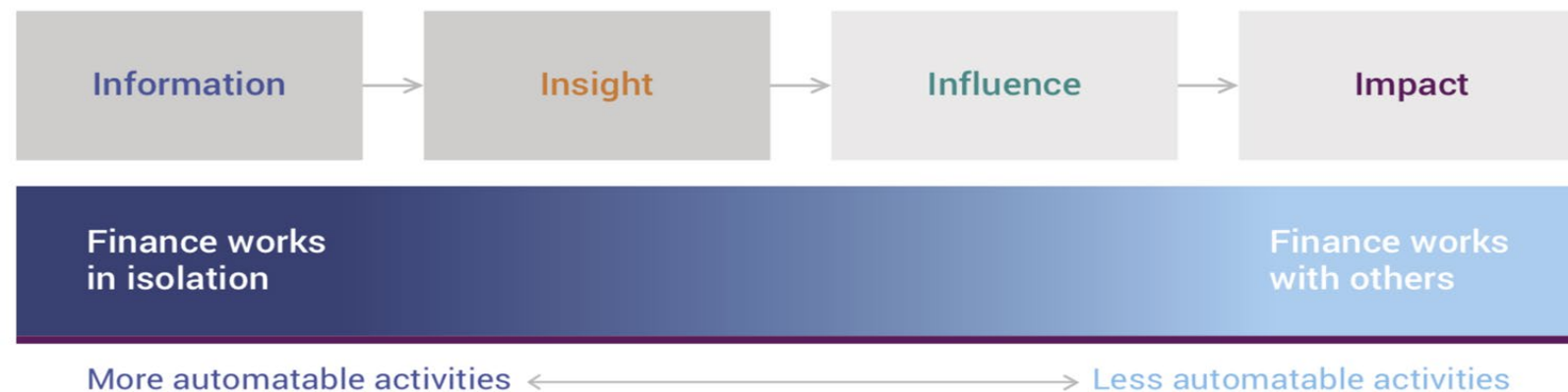


The Potential for Automation Activities in Finance & Accounting

Figure 1: The potential for automation of the basic finance activities



Estimates of extent to which different types of roles could be automated; Source: McKinsey



Source: CGMA - Changing Technology & Finance

Artificial Intelligence



LIVE WEBINAR

How we used AI to grow advisory services



Richard Arthurs
CPA



Kenneth Pun,
CPA



Adam Massia,
CPA

October 8, 2019

1:00 p.m. ET / 10:00 a.m. PT / 5:00 p.m. GMT

Join our industry panel of CPAs that have gone through the diligence and deployment of AI-based solutions to offer new advisory services to their

ON-DEMAND WEBINAR

CPA roundtable: Planning an AI roadmap for 2019



John Colthart



Samantha Bowling



Robin Hoag



Gary L. Krausz

Do you know whether AI is right for your audit practice? Three CPAs explain the value of adopting AI, how it's changing the business, and ways to develop an AI roadmap for your firm.

**AI for Accountants – Not
“coming”, it’s here!**

RPA Marketplace

RPA50: Robotic Process Automation Software Marketplace

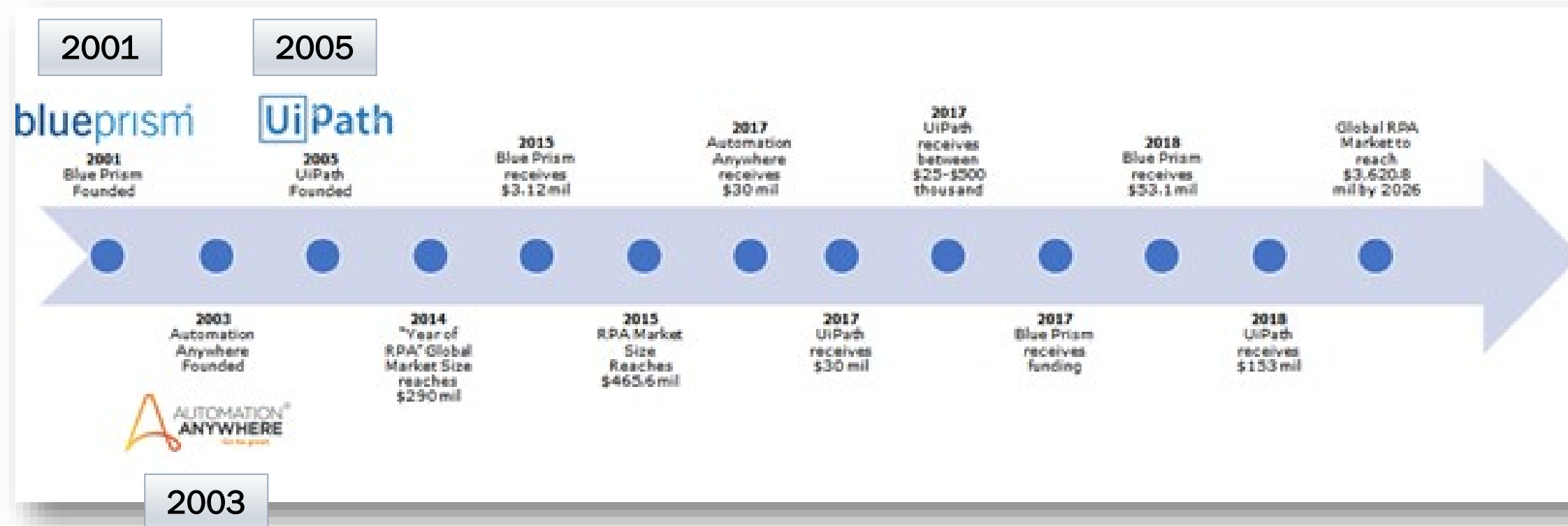


	Horizontal Platforms			BPM + RPA		IT/BPO Services + RPA	
Generalists							
Specialists	Customer Service Automation			Finance		IT and Testing Automation	
	ERP, Mainframe and Enterprise System Automation						
	AI-based Business Process Automation						

Version: September 2018

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RPA Is Not New!



BUSINESS
LEARNING
INSTITUTE

The Startup Ecosystem Map 2018 is a comprehensive directory of startups, organized into 12 main categories and a 'SECTORS' section at the bottom. Each category contains numerous startup logos and names, representing a wide range of industries and technologies.

Main Categories:

- Speech & Text:** Canny.ai, iQOO, Verbi, Impelo, VoiceSense, Gver.ai, LinguaTip.
- Computer Vision:** EyeSafe, AGENT, IMAGERY, Facetune, Vision, ISIT, RVC, Vision, ISIT, RVC, Vision, ISIT, RVC.
- Hardware:** Unispec, Axon, Capacitix, PUIPOS, NUIVITE, Vayyar, RISEE, TRIEYE.
- AI Enablers:** Equalum, Lighttricks, Omnisol, Razerio, Comet, Shoodoo, binah, WEKA.IO, Dopamine, Talamoos, Parallel, Apertio, NODS, firefly.ai, Gladio.
- AR/VR/MR:** Zsens, human eyes, Resonai, FlatSpace, BrainVR, moed.ai, CONVERSATION ONE, VAAI, Arcatop, scandave, Existence, VIKI, Cybertix, R.
- Bots & Biometrics:** D-ID, Verifyoo, serv.ai, BrainVR, moed.ai, CONVERSATION ONE, VAAI, Arcatop, scandave, Existence, VIKI, Cybertix, R.
- Misc.:** Orient, nanoscent, COBWEB, COPYLEAKS, IDRI, scio, Knowmail.
- New Media:** RapidUI, Magisto, Pommom, COMIO, Cybot, Boatbot, Aicaption, Guggy, WIBITZ, nexasRA, o r y x.
- Autonomous:** InnoVis, arbel, KODIAK, BVV, VAYAVISION, i4drive, Vectorio, Phantom Auto, nexarRA.
- Security & Connected Car:** LEVEL, AURORA LABS, SAFERIDE, S AVERONE, Foretellix, NTRAFFIC, VALERIAN, ENIGMATICS, Upstream, ENIGMATICS, Upstream, ENIGMATICS, Upstream.
- Monitor & Misc.:** POWHERE, JANGO, VIO, outloft, WHITE RAVEN, ENROUTE, Fleetonomy, Optibus, SONICLUE, ENDOWTCH.

SECTORS:

- AgriTech:** SKYX, Planet, See Tree, FruitSpec, BeeVee, Flux, Fieldin, AgriSense, GemmaCart.
- Advanced Targeting:** PHRASSET, TEXTLAB, DEEPR, Personalize, EXPOSE, BLINK, BOX, FIXEL, Jagger, keywee, connecto.
- Analytics and Insights:** Optimove, webbo, Segmanta, pixoneer, AIMEE, personal, Brainster, klear, COINVEST, HINTIGO, CaliberMind, FUTURE, urbano, Brand Total, SPIRO.
- Content:** Vid, watch, articool, ADINAVY, WebClip, anyid, BrightInfo, Comodo, jinni, Suma, Taboola, outbrain, VAULT.
- Mobile:** TapReason, BReal, Bigabid, GAMEWHOGS, MBBO, NUVID, spotted, YOU-APPI.
- Programmatic:** predictiveBid, lappTV, Sift, bidago, cecale, nRoll, NEEFLA, smart.bid, signal.io, ALUCINE, mysense.
- Clients & Leads:** DataWit, DYNAMIC YIELD, CIBC, IDENTITY, person.
- Platform:** Tropica, GAMOSHI, okiano, LIBERO, Browsi, MYSTOR.E, displayio.
- Misc.:** AXONITE, okiano, LIBERO, Browsi, MYSTOR.E, displayio.
- Drones:** IGH LANDER, vlive, skywatch, ClearVuze, PERCEPT, SIGHTTEC, thirdeye.
- Education:** CoQua, examPAL, LANGUAGE ZEN, Sense, mindojo, Sy mbolab.
- Sports & Fitness:** CoachAI, Zone7, FITSCANNER, VSC, Pico, PhysioMax, TRACK360.
- Parenting:** bosco, Jimmy, hereo, inanna, Keepers.
- CleanTech:** SOLVIEW, RAYcatch, Grid4, BladeRanger, greensun.
- Travel:** Seevooy, Skyloft, splitty, LitiGate, Paralegal, Legally, LawGeex, core text, LegalHive.
- Legal:** TagDox, Otica.ai, LitiGate, Paralegal, Legally, LawGeex, core text, LegalHive.
- Home, City & Misc.:** 24, Zoi, AnyDO, CAUSEMATCH, t.e.m.i, Q.QUE, ViewV, Valid, ftagle.

© Daniel Singer 2018
Source: www.startuphub.ae

Blockchain

FEATURE / TECHNOLOGY

A different approach to applying blockchain

A Virginia-based CPA is rolling out a blockchain-based marketplace for transferring tax credits in all states that have legally transferable tax credits.

By Louise W. Reed, CPA, as told to Jeff Drew

7 hours 30 minutes ago



...and starting to
see Blockchain
use cases

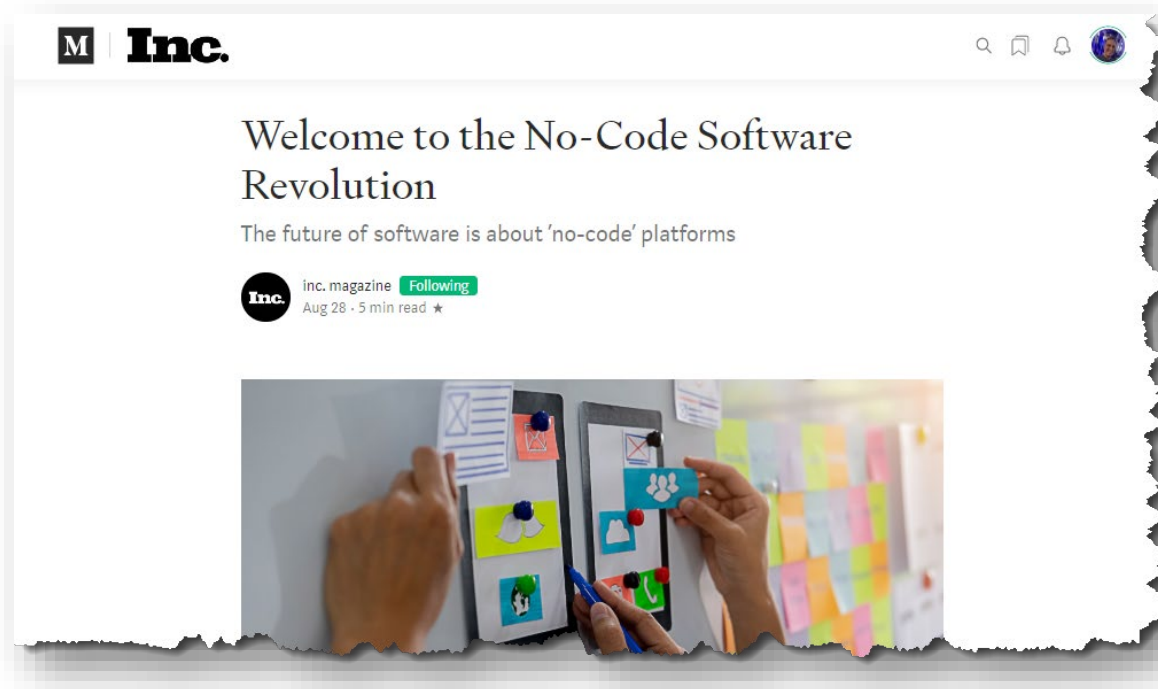
**“AWARENESS,
LEARN,
LEVERAGE”**

Mobile

Mobile

- ❑ “Mobile First”!
- ❑ We are mobile, our clients are mobile
- ❑ Opportunity to engage our clients has never been easier!
 - “**No Code**” services are making it easy for anyone to develop apps!
- ❑ *Have we adjusted our behaviors and workflows?*

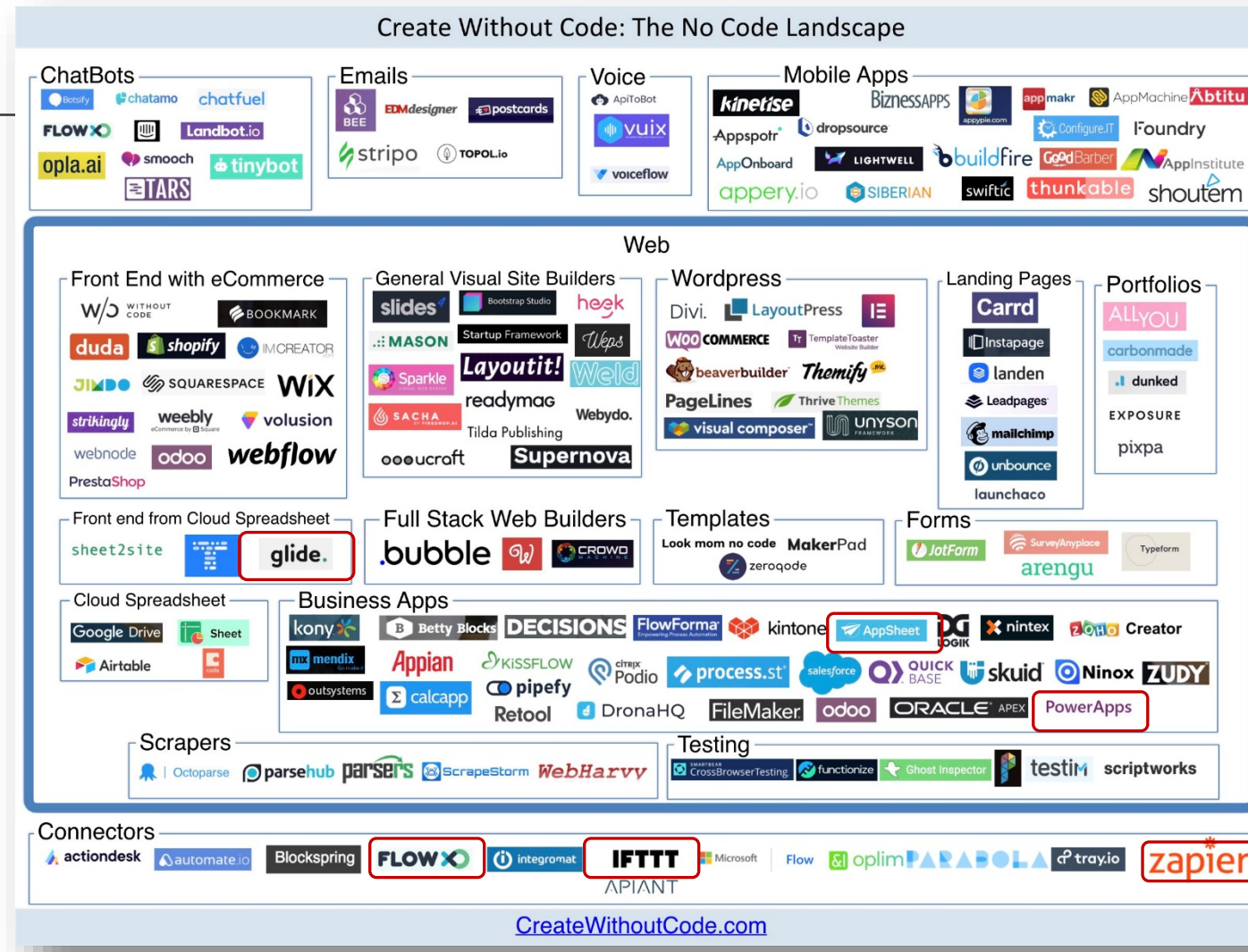
No-Code?



<https://medium.com/inc./welcome-to-the-no-code-software-revolution-6b75ee967df7>

*“Just like Google Cloud and Amazon Web Services dominate the cloud computing infrastructure market, in the future, **no-code infrastructure platforms will shift the balance of power away from custom development to no-code application and business models.** Zapier, for example, enables data sharing and “handshakes” across dozens of applications.”*

“No-Code” Landscape



Mobile App “Handouts”



GLIDE APP Opportunity!

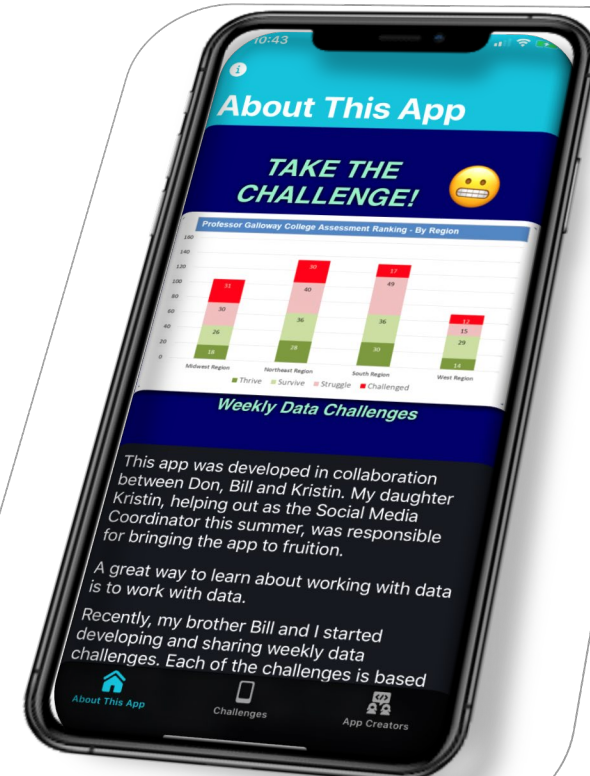
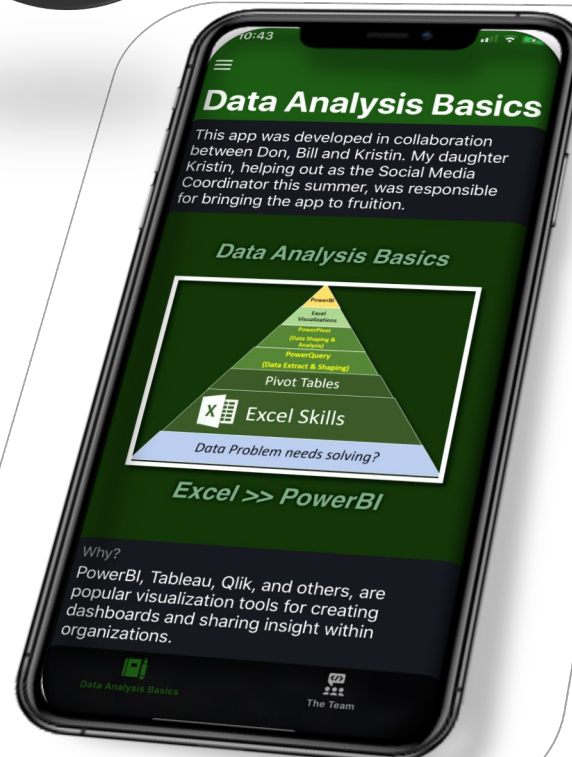


Excel >> PowerBI Intro

<https://youtu.be/uDq1zih3Me4>



Excel Basics & More



Take The Challenge!

Polling Question #2

Considering Automation, a topic covered was the PwC “Automation Toolbox” visual. Of the items mentioned below, which is considered the most basic automation tool?

1. Robotic process automation
2. Automation Scripts
3. Macros
4. Data prep tools

“WHAT CAN I DO?”

“What Can I Do?”

1. Overview
2. Personal Knowledge Mgmt (“PKM”)
3. One approach
 - **A**WARENESS
 - **L**EARN
 - **L**EVERAGE

What Can I Do? - Overview



Photo Credit Sharon McCutcheon via Unsplash

Shift from Career Paths to Career Experiences: Five Ways to Invest in Yourself Today

Published on October 4, 2019



Danielle Guzman

Global leader | Social Media | Digital Marketing
| Employee Advocacy | Personal Branding

10 articles



<https://www.linkedin.com/pulse/shift-from-career-paths-experiences-five-ways-invest-yourself-guzman/>

“The future belongs to those who want it.”

“...wanting and getting are two different things.”

“... it’s necessary to translate “want” into action and transform yourself into a future-ready asset,...”

“But whereas in the past your employer may have managed this transformation, the future of work means it begins and ends with you.”

Here's The Secret...

**everything
you want
is waiting
for
you on the
other side
of consistency**

Personal Knowledge Mgmt ("PKM")

1. "Personal knowledge management (PKM) is a collection of processes that a person uses to gather, classify, store, search, retrieve and share knowledge in their daily activities (Grundspenkis 2007) and the way in which these processes support work activities (Wright 2005).
2. It is a response to the idea that knowledge workers need to be responsible for their own growth and learning (Smedley 2009).

Breakdown “A.D.A.M.”

1. **A**nalytics (ALL)
2. **D**igital (ALL)
3. **A**utomation (AL)
4. **M**obile (AL)

Awareness - 1

1. Identify your core sources (Industry, Business, influencers, Social feeds, #hashtags, YouTube, etc)
2. If topic AT ALL hits your radar, **CAPTURE IT** (Digital and searchable is critical!)
 - Leverage the Cloud - develop a “Content Library” (PDFs, links, articles,etc)
 - Content locations should be minimized (e.g., Evernote, OneNote, Slack, etc) for easy access and retrieval.

Awareness - 2

3. ***Automate*** whenever possible (e.g, everything I “like” on Twitter gets captured in a spreadsheet, specific hashtags, etc)
4. Make the process **FLEXIBLE** (mobile)
5. Crowd-source content curation!
6. Google Search is your friend!

Learn

1. Identify OPPORTUNITIES (Effort vs Reward consideration, “disproportionate advantage”) – Brainstorm!
2. “What If?”, “Why?”
3. Now, our content library becomes a Resource
4. Consistency is CRITICAL
5. Develop a Learning Group
6. Set constraints (Complete x by y)
7. Repeat the process - this journey never stops

Leverage

1. Build resources for repeated use
2. AUTOMATE
3. Preparation + Opportunity = “Luck”
4. ABC - Always Build Capacity!
5. Share & Teach what you learn!

Bringing It Together



Mobile (Evernote, OneNote, [GoodReader](#), [Slack](#), InstaPaper)



Desktop (X1 Search, Excel File Directory list)



Cloud (Box, Google Drive, OneDrive, Dropbox)



MS Office 365 (A Must)



Excel Power Tools, PowerBI & Process Automation (PowerQuery, PowerPivot)



Automation - BASIC (Macros, Scripts, MS Power Automate, Zapier, IFTTT)

Develop A Content Aggregation Process



Don Tomoff, MBA, CPA

Speaker | Instructor | Consultant | It's time for DIFFERENT. #Digital #Data #mob...
5mo • 🌐 Anyone

Tip #115 - Develop a process to aggregate content relevant to you - and automate as much as possible. #twinztalk #twinztechtip

In today's world, information overload is constant! We can't possibly touch and manage everything we want to read, share or refer back to by "remembering" where we saw it.

Content management is imperative. And a process where you don't NEED to remember is the only workable method.

At the most basic level, here is my process:

- 1 Focus your sources. I rely on #Twitter, Medium and Flipboard primarily. Social media also has to be dealt with...
- 2 Anything I see that I MAY want to read gets bookmarked / favorited or saved to #Instapaper or #Evernote.
- 3 If an item is bookmarked / favorited, if possible, I automate collecting a list using #IFTTT (see below). This is a CRITICAL step for me! 🙌👍
- 4 These lists - maintained in #googlesheets - are then automated to feed a searchable #Email Dashboard.

<https://www.linkedin.com/feed/update/urn:li:activity:6532947539182841856/>



"We can't possibly touch and manage everything we want to read, share or refer back to by "remembering" where we saw it."

Slack For Content Curation

<https://www.linkedin.com/feed/update/urn:li:activity:6513042659769147392/>



Bill Tomoff •

CFO - InstallNET.com | Consultant | Volunteer - Board specialove.org | Avid Lea...

7mo • Anyone

Slack for content curation

Tip #53 - Use [Slack](#) as a content curation tool! [#TwinzTechTip](#)

For several years, [Don Tomoff, MBA, CPA](#) and I have been a fan of the collaboration tool [#Slack](#). In the continual quest to learn, and help others, we come across and read an incredible volume of great content. How can this content be captured for future reference?

There are countless solutions to be used to organize content curation (see link in comments for [Hootsuite](#) discussion about content curation), and one key aspect for us has been using Slack. Why?

[1] Above all, the instantaneous [#search](#) functionality of Slack is compelling.

[2] Slack is FREE for the first 10,000 messages, and 5GB of storage. Since most entries are text and links to content, the storage use is negligible.

[3] Slack [#channels](#) help provide structure, if desired, but are not required thanks to search ability.

In the example shown below, the power of search is illustrated. Over the past few years, this Slack application has grown to 215 channels and almost 3,500 messages...but here I specifically am searching for our collection of [Tanmay Vora's](#)

[#tanmayvora](#) in the [#twinztech](#) channel. 44 results



Create a Digital Content Library



Don Tomoff, MBA, CPA

Speaker | Instructor | Consultant | It's time for DIFFERENT. #Digital #Data #mob...
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Tip #49 - Create (and maintain) a digital Content Library. #TwinzTalk
#twinztechtip

Back in 2010, shortly after the #iPad was introduced, I started keeping a library of documents, files, videos, etc on the device. In June 2010, I presented an "iPad for Business" seminar with this concept as a business use case.

At that time, I had over 250 pieces of content being synced to GoodReader on my iPad (and ALWAYS available!).

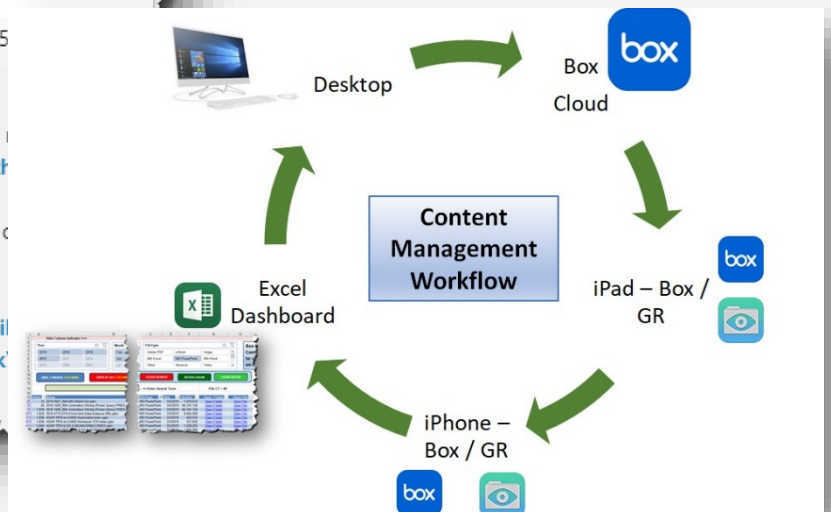
I have been doing this know for 9 years (9 YEARS!). Today I have over 2.5 of content.

The content is managed via any device I choose - add, delete, organize, annotate, etc. and it is instantly searchable across every platform. #justtl

Thanks to #Excel #PowerQuery, I also have a dynamic Excel dashboard of contents. It updates with current content upon refresh...)

This is the magic of #mobile, the #cloud and a little creative thinking. Bill recall you did a blog post on this in 2010? It was my inspiration! #Thank

If you want to know more, you may want to come back to my blog.



<https://www.linkedin.com/feed/update/urn:li:activity:6511929597557293057/>

Polling Question #3

Of the major trend groups, what area(s) were recommended for accountants to focus on FIRST for “Leverage”?

1. Data
2. Automation
3. Data & Digital
4. Mobile

START. HERE. – 6 BASICS

1. Data

- Excel / Office 365
- Power Tools (PowerQuery & PowerPivot)
- PowerBI (other viz tools if you have them (Tableau, etc.))

2. Digital

- Collaboration (MS Teams / Slack / Zoom, etc.)
- Digital document management / access anywhere
- Content Curation / build and BECOME a resource.

WRAP UP

Wrap Up

Review Learning Objectives:

1. Understand the significant technology trends impacting the accounting profession ✓
2. Understand a framework for monitoring and awareness of technology changes ✓
3. Develop a personal knowledge management (“PKM”) system for use by individuals or their organization ✓
4. Apply the “ALL” (Awareness, Learn, Leverage) process to developing relevant skills ✓

One Final Thought

“Our choice is profound, and more urgent every day: either do a job where your best judgment is required, or do a job where management will work hard to replace you with someone cheaper.

Race to the top, race to the bottom.

Either way, you might win. Up to you.”

-- Seth Godin

About Don

Don Tomoff



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