


Becoming A DIGITAL CPA:

A Digital Ninja Master Class

presented by
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mas·ter class

noun: masterclass; plural noun: masterclasses; noun: master-class; plural noun: master-classes; noun: master class; plural noun: master classes

“... a class, often in the arts, given by an expert to highly talented students.”



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Author, Speaker, Thought-leader

- *Eide Bailly, LLP* – Senior Manager, Tax and Technology Consulting
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Becoming a Digital Ninja CPA
What We'll Cover ---



1. First impressions
2. Literacy
3. Recognizing Disruptive Technologies
4. Trends to Study
5. Genre's to Know About




First Impressions Matter




Personal First Impressions – 1986

Negative	Positive
<input type="checkbox"/> Old car	<input type="checkbox"/> Nice car (not TOO fancy)
<input type="checkbox"/> Poor office location	<input type="checkbox"/> Prestigious office address
<input type="checkbox"/> Wrong or no country club	<input type="checkbox"/> Best country club
<input type="checkbox"/> Cheap letterhead	<input type="checkbox"/> High end stationary
<input type="checkbox"/> Low quality report paper	<input type="checkbox"/> Embossed report covers
<input type="checkbox"/> No Yellow page ad	<input type="checkbox"/> Full page w/ picture & red ink
<input type="checkbox"/> No Chamber of Commerce membership	<input type="checkbox"/> President of Rotary, Board of Chamber
<input type="checkbox"/> Not returning phone calls	<input type="checkbox"/> Call back by end of next business day
<input type="checkbox"/> Inappropriate attire	<input type="checkbox"/> Three piece suit
<input type="checkbox"/> Too many erasures on workpapers	<input type="checkbox"/> Beautiful, consistent, colorful tickmarks
<input type="checkbox"/> Too many out of town clients	<input type="checkbox"/> Every business on main street



Technological First Impressions - 2016

Negative	Positive
<input type="checkbox"/> Flip phone	<input type="checkbox"/> Large iPhone
<input type="checkbox"/> Unprofessional email address	<input type="checkbox"/> Fname; Fname.Lname; or FinitialLname
<input type="checkbox"/> TYPING IN ALL CAPS	<input type="checkbox"/> Proper grammar, punctuation & email signature
<input type="checkbox"/> Using a 1990's email platform	<input type="checkbox"/> Business or personal domain, Gmail
<input type="checkbox"/> Twitter non-existent or silly address	<input type="checkbox"/> Recognizable Twitter handle
<input type="checkbox"/> Out of date LinkedIn page	<input type="checkbox"/> Up to date, photo and contact info
<input type="checkbox"/> Out of date iContact information	<input type="checkbox"/> Professional iContact / vCard card available
<input type="checkbox"/> Not "accepting" iCalendar invites	<input type="checkbox"/> Collaboration tool like Doodle
<input type="checkbox"/> Dialing in to a video meeting	<input type="checkbox"/> Zoom or even Skype
<input type="checkbox"/> Old style laptop	<input type="checkbox"/> MacBook Air, Ultrathin, Surface Pro
<input type="checkbox"/> Not using text messaging	<input type="checkbox"/> SMS, Twitter DM, Slack



Technology Literacy



Be "In the Know"

Read –

- > Gizmodo
- > NY Times Tech & Bits
- > USA Today Personal Technology
- > Wired magazine
- > CNET Emerging Tech News
- > What's Your App-titude (*Journal of Accountancy*)


Social Media

- > LinkedIn
- > Facebook
- > Twitter

Listen

- > TWIT (This Week in Tech)
- > TED Radio Hour
- > Re/code Decode



stay in the know







Templosion
tem-plo-sion [tem-sploh-zhuhn] noun


“the implosion of everything into compressed time”



A Note on Predictions



“It’s tough to make predictions, especially about the future.”
— Yogi Berra



Our near term view is always unclear.

- "Inside the Tornado"
- "Tipping Point",
- "Crossing the Chasm"

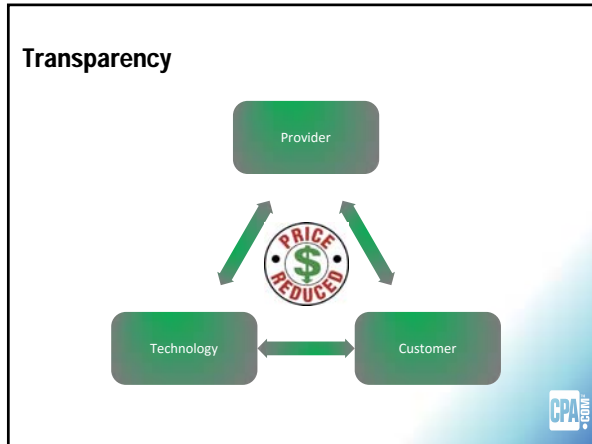
Disintermediation

Disintermediation

Removing the middleman -- a popular buzzword used to describe how Internet-based businesses are using cloud and mobile technologies to reach customers.

These companies provide products and services cheaper and faster.


These technologies are revolutionizing the way products and services are bought and sold, and **disintermediation is the driving force** behind this revolution.



- ### 8 Strong Indicators
1. Ratio of expenditures -- Legal to Tech
 2. Governmental involvement
 3. Excessive resistance --- mockery
 4. Generational differentiation
 5. Huge efficiencies
 6. Protectionism
 7. First or early mover(s) soon copied by others
 8. Who benefits?
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- ### Some Trends to Study
1. The Internet of Things
 2. 3D Printing
 3. Peer-to-peer lending
 4. Restaurants
 5. Hotels / lodging
 6. Cars
- CPA logo in bottom right corner.

Personal Applications



Genre's to Know About

1. Social	6. Google Voice
2. Personal	7. Zoom
▪ Harry's	8. Rivio
▪ PillPack	9. MobileMeet
▪ Amazon Prime Subscriptions	10. Doodle
3. Banking	11. Dropbox / Box / One Drive
4. Investing	12. Audible / Overcast
▪ Mint	13. Tile
▪ Personal Capital	14. Kindle / Flipboard
▪ Betterment	15. Waze
▪ Prosper / Lending Platforms / Biz2Credit	16. Find My iPhone
5. Travel	17. Apple Pay / Wallet / Apple Watch
▪ Uber / Time Travel	18. Paperless Post / Eventbrite
▪ AirBnB	
▪ TripIt	
▪ TripAdvisor	
▪ Hilton / Hyatt / SPG, etc.	
▪ Airline apps	



LaFollette's Maxim

The "Law of Probabilities" says there is ALWAYS a technological solution. It's your job to find it. Practice identifying and adopting it. Then adapt your processes and habits to take advantage it.

It's like exercise --- the more you do it, the better you get!

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