1

Firm name:

_____

City and state of firm HQ:

_____

Number of partners:

_____

Total number of employees (excluding partners):

_____

Number of offices:

_____

Does your firm have a written technology strategy? (Y) (N)

Does your firm regularly discuss technology issues with other firms (through peer groups, online forums, professional organizations, etc.)? (Y) (N)

What percentage of your firm's budget is devoted to technology?

_____

Does the number in the previous question include salaries for tech/IT personnel? (Y) (N)

Does your firm have a CIO or other lead technology executive? (Y) (N)

How many employees do you have on your firm's internal technology team?
(Does not need to be a whole number; for instance, an employee who spends half their time on IT would count as .5)

_____

How many hours of training specifically on technology does the average firm employee get every year?

_____

What is your firm's average number of computer screens per employee?

_____

What percentage of your employees use laptops?

_____

Does your firm support remote work? (Y) (N)

If yes, what percentage of your employees regularly work remotely?

_____

If you answered more than 90% to the previous question, do you consider your firm "virtual"? (Y) (N)

Do you have physical servers in any of your firm's offices? (Y) (N)

How often do you back up your firm's data? *(Choose one)*

☐ Continuously

☐ Once a day

☐ Once a week

☐ Less frequently than once a week

How often does your firm fully test those backups (i.e., downloading, restoring, and randomly testing backed-up data)? *(Choose one)*

☐ More than once a month week

☐ Once a quarter

☐ Twice a year

☐ Once a year

☐ Less than once a year

☐ Never

How many different software applications does your firm use?

_____

What percentage of those are cloud-based?

_____

Does your firm have a document management system? (Y) (N)

Does your firm have a client-facing portal? (Y) (N)

Does your firm use e-signature software? (Y) (N)

What percentage of your firm's work products are delivered in the following ways
(should total 100%)

%	Paper only
%	Both paper and electronic/digital
%	Electronic/digital only

Does your firm have a workflow system? (Y) (N)

Does your firm automatically generate, sign, and transmit any of the following documents?
(Select all that apply)

☐ Engagement letters

☐ Representation letters

☐ Staff offer letters

☐ Other correspondence

What percentage of your firm's workflows are paperless? *(Choose one)*

☐ Less than 25 percent

☐ 26-50 percent

☐ 51-75 percent

☐ 76-90 percent

☐ 91-100 percent

Do you offer technology services to clients? *(Choose one)*

☐ No

☐ IT/data security consulting

☐ Software implementations

☐ Software purchase consulting

☐ Software support/training

☐ Hardware consulting/implementations

Please keep all following answers below 400 words. Please note that responses may be quoted in whole or in part in the May issue of Accounting Today.

Describe your firm's approach to technology.

(max. 400 words, including spaces)

How you instill a cohesive tech-forward culture in your firm?

(max. 400 words, including spaces)

What are some of the innovative ways you help clients work with your firm digitally?

(max. 400 words, including spaces)

How have these practices helped your firm and the clients work more effective together?

(max. 400 words, including spaces)

What is your firm's technology strategy going forward?

(max. 400 words, including spaces)

Please describe one (1) of the following:

A time when you used technology to serve a client better.

(max. 400 words, including spaces)

A time you used technology to create or significantly revamp a service area.

(max. 400 words, including spaces)

A time when your firm overcame a major technology challenge.

(max. 400 words, including spaces)

Contact and attribution information

Name and title of person submitting response:

_____

Email:

_____

Phone:

_____

Name and title of person to attribute firm responses to *(if different from person submitting response):*

_____