15 Key Details Every Tax and Accounting Firm Should Know About SaaS

How To Put SaaS (Cloud Computing) To Work In Your Firm

Today's Speakers

- Greg LaFollette, Host and Moderator, CPA.CITP

- Matt Jagst, Product Manager–Thomson Reuters

Housekeeping

- Today's webcast will last approximately one hour

- There is no CPE offered for this webcast

- You may ask questions at any time. We'll answer as many of them as we can.

- There will be periodic "polling questions" which we hope you'll answer.

- Near the end of the webcast we'll have a drawing for a special give-away.

Special give-away from

DS-90U Smart 9" LCD Monitor

- Supports Multi Monitor Mode

- Perfect for Laptops and Desktops

- Lightweight and Portable

- Landscape and Portrait viewing

- USB for Power and Video (no video card required)

- PC and MAC Compatible

- Supports a variety of Applications

Agenda

- What is SaaS?

- Why is SaaS hot today?

- What does SaaS bring to the profession?

- What are the benefits & advantages of SaaS?

- What else should I take into consideration?

- What should I ask my vendor?

- Where do I go from here?

What IS SaaS (Software as a Service)?

- The Tax and Accounting business at Thomson Reuters defines SaaS as:

  SaaS is a complete software solution that is accessed via the web and dynamically allocates resources to meet the needs of the end-user while providing secure, anytime, anywhere access, high-level security & data privacy via a top-tier data center.
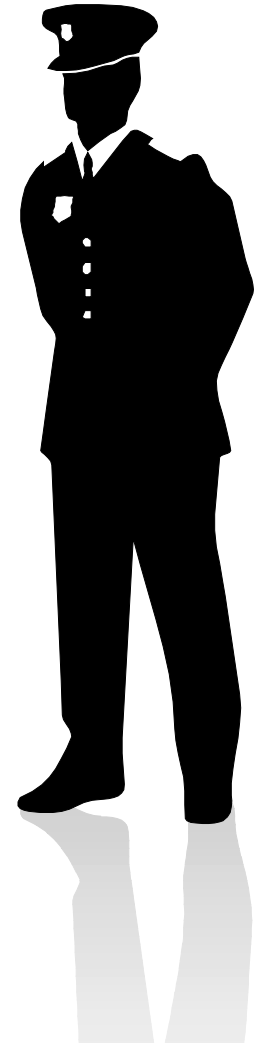 *SaaS is typically priced according to an affordable and flexible monthly leasing model.*

Why Is SaaS Hot Today?

- Attractive, cost-efficient pricing models, limited up-front costs

- Reliability of Internet access

- Advanced and dependable security and privacy

- Web-hosted environment allows firms to focus on business, rather than IT management

SaaS Meets The Needs Of The Tax and Accounting Profession

- Superior security & privacy features

- Remote access provides:
  - Staff retention with
    work/life balance solutions
  - Non-traditional options
    for "busy season" staffing

- Allows you to tap into industry specific
  expertise in different locations
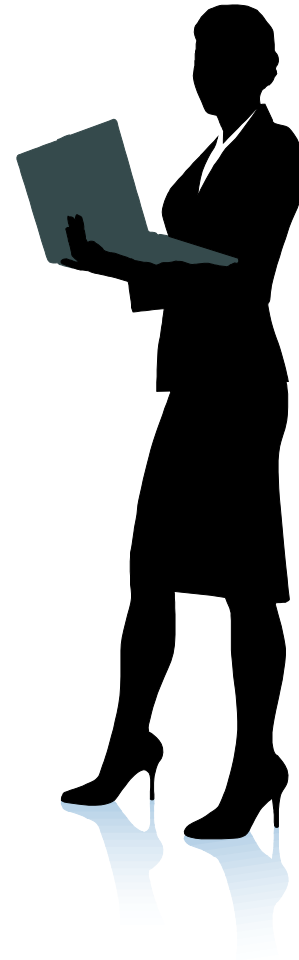
- Supports mobile users in the field

Advantages of The SaaS Model

- Low start-up costs

- Anytime, anywhere access

- Reliable and automatic backup systems

- Automatic updates & version control

- Significantly reduced IT infrastructure

- High-level security

- Ensured business continuation

Other Considerations

- Internet connectivity & bandwidth concerns

- Integration with locally installed applications

- Vendor experience and history

Process Efficiencies & Increased Client Satisfaction

- Reduced IT demands = More time to service clients

- 24/7 anytime/anywhere software access =

  Flexibility
  - Staffing part-time/remote employees
  - Software access from client's office
  - Software access from home
- Integrated software = Improved staff efficiency
- Automatic backup = Significant time savings
- Integrated client applications = Improved client service & progressive image

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Ask Your Vendor

- How long have you been delivering applications in a SaaS environment?

- Can I use your SaaS solution with limited up-front costs and a regular monthly fee?

- If I discontinue your SaaS offering how do I access my firm's data?

- What infrastructure is in place to ensure access to my firm's software and data when needed?

- What security provisions are in place for data and products provided?

Where Do I Go From Here?

- Learn as much as possible about SaaS and solutions available in the market

- Evaluate your firm's current software and hardware environment

- Investigate local Internet service and reliability

- Question vendors on their SaaS solutions

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– Full Service

– Tax

– Accounting

– Admin

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UltraTax CS	Payroll CS
FileCabinet CS	Practice CS
Write-Up CS	Microsoft Office w/Exchange
Engagement CS	Many more…

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Q & A