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INFORMATION TECHNOLOGY REPORT

2017 survey and analysis conducted by: The Platt Group / INSIDE Public Accounting
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THE 2017 INFORMATION TECHNOLOGY REPORT

The annual INSIDE Public Accounting Information Technology Report is an independent, up-to-date set of economic and management statistics available about the accounting profession.

IPA’s Methodology: Each IT survey submission is reviewed and examined. If data appears to be incorrect or questionable, we resolve issues with the reporting firm. While we do everything possible to ensure accuracy, the participating firms bear the ultimate responsibility for providing accurate data.

Throughout this report, all tables are presented by revenue bands and geographic regions. IPA does not provide data on any individual firm.

TERMS AND DEFINITIONS

Non-Big 4: This category includes all participating firms and includes all national firms, but excludes Big 4 firms.

Averages: The averages included in this report are averages of data supplied by survey participants. In some instances, the averages may not appear to total correctly; this is a function of rounding.
We extend our gratitude to the 154 firms that participated in the seventh annual Information Technology Survey. CIOs, CTOs, managing partners, firm administrators, controllers, office managers and others all played a part in gathering the required data for the survey. We appreciate your efforts and flexibility, your input and suggestions for improvement, and your willing cooperation in ensuring accurate and timely submissions.

Maintaining confidentiality is a responsibility we at INSIDE Public Accounting take very seriously. That uncompromising commitment is the foundation of our business, and we appreciate the trust you have placed in our company.

Please remember IPA can also serve as a resource as you review benchmarking and performance improvement opportunities. Consider inviting IPA to make a customized presentation at your next partner retreat. IPA can delve deeper into the trends and provide detailed information on specific areas of interest.

We look forward to continuing to serve you and the profession, and with your feedback and suggestions, we strive to improve this report every year. Feel free to contact us.

Email us at mplatt@plattgroupllc.com or kplatt@plattgroupllc.com to see how the lessons learned from hundreds of firms can be used to improve performance at your firm.

Mike & Kelly Platt
SUMMARY HIGHLIGHTS

Publishers’ Note: Unless otherwise noted, all commentary relates to non-Big 4 firms, but includes all participating national firms. Not all firms chose to answer all questions. Percentages cited in the following pages/tables are based on firms that answered those specific questions.

OVERVIEW

The 154 firms that participated in the IPA Information Technology Survey this year include:

- 43 Firms above $30 Million
- 31 Firms between $20 Million and $30 Million
- 53 Firms between $10 Million and $20 Million
- 27 Firms under $10 Million

IT PERSONNEL

Across the country, each IT professional is responsible for working with an average of 37 firm personnel - from 32 in the Great Lakes to almost 40 in the West.

Individuals dedicated as IT trainers make up an average of 7% of all IT personnel employed by firms today.

Individuals dedicated as IT help desk staff make up an average of 28% of all IT staff in firms of all sizes.
 NETWORK TECHNOLOGIES

One-third of firms are using servers running Microsoft Server 2008. Nearly half have migrated to Microsoft Server 2012 while 25% of servers are running through Virtualization.

Dell still dominates the hardware landscape, with two-thirds of firms choosing Dell for desktops, and 61% choosing Dell for laptops. Lenovo has 19% market share on laptops, with HP close behind at 18%.
Windows 8 never really caught on. Just 6% of desktop / laptop use Windows 8 as their operating system. More firms have switched to Windows 10 this year with 31% of all participating firms using the operating system on their desktops, up from 3% in 2016.

MOBILE DEVICES

Verizon is the clear winner among mobile service providers with 75% of participating firms choosing Verizon.

Apple or Android? It’s running neck-and-neck for these two dominant cell operating systems, with Windows Phone a distant third, and Blackberry continuing its slide with only 4% of firms still using it.

Apple is dominant as the main tablet operating system in use by 40% of all participating firms followed by Windows and Android tablet systems.

Sixty-seven percent of participating firms have a Bring Your Own Device (BYOD) plan for cell phones, with nearly 14% implementing within the last year. This increase is mostly seen in firms below $20 million and those in the $30 million to $75 million revenue band.

Cell phone reimbursements / stipends are highest in the Great Lakes, averaging $66 per month, and the lowest are in the Northeast, averaging $46 per month.
CLOUD COMPUTING

Perceptions of cloud computing are improving. Firm management is slowly becoming more comfortable with the cloud. Among all participating firms, 34% now indicate that management is more secure with cloud computing than with internal infrastructure, up from 20% last year.

Don’t expect costs to go down if you move to the cloud. Ninety-three percent of all firms indicate costs are either going up or staying the same.

IT maintenance of applications is easier when using the cloud, according to 74% of respondents.

Firm leaders are less fearful of losing sensitive data, with just 21% of firms indicating that as their main concern, down from 30% last year.

Loss of control is once again cited as the biggest concern – identified by 42% of survey respondents.

Cloud-based applications are being used more frequently across the board, and continue to be dominated by research (81% of firms), client portals (75%) and payroll (54%).

INTERNAL SYSTEMS

The majority of surveyed firms (77%) have an intranet. Of those that have an intranet, 63% are maintained by in-house staff.

SharePoint is the preferred provider for intranet systems, with 62% of firms selecting them. Specific software programs vary significantly. For a comprehensive overview of what other firms in your
revenue band are using, consult the full Information Technology Report tables. The most dominant software programs for each application include:

**CLIENT PORTALS**

Ninety-six percent of participating firms use a client portal, but only 8% report that all clients are using it.

Half of reporting firms provide training for clients on how to use the portal, even though most firms indicate that the portal is self-explanatory.

The majority of firms (53%) indicate that client portals aid in document management. Regionally, the highest satisfaction in this area is in the Great Lakes (68%) and lowest in the Great Plains (44%). The top two client portal choices are Sharefile (40%) and CCH Axcess (25%).
INTERNAL PROCEDURES

Only 30% of all participating firms have instituted a formal procedure to ensure information technology projects / issues are effectively managed.

For firms above $30 million, that number is still below half (48%). Firms in the West are the most formalized at 40%, and the Southeast lags behind at 20%.

Fifty-eight percent of firms have a formal recovery procedure in place to ensure continued processing in the face of adverse conditions.

Internal software development teams are in place in 43% of firms above $30 million, and 59% of firms above $75 million.
About Us

The Platt Group/INSIDE Public Accounting provides firm leaders with innovative concepts to improve their firms.

The Platt Group publishes two award-winning publications: the subscription-based INSIDE Public Accounting newsletter and the annual IPA Benchmarking Report. These tools, along with other benchmarking tools, assist leaders in shaping their firms towards being not only more efficient, growth-minded and profitable, but also forward-looking, innovative and attractive to a new generation of professionals.

The Platt Group is dedicated to helping firm leaders, and their firms, achieve their ultimate potential. Whether they are researching the latest trends, benchmarking the leading firms, or working with leaders to share and garner knowledge, we are always looking for ways to help.

Kelly Platt and Mike Platt
Principals, The Platt Group / INSIDE Public Accounting

“I have subscribed to INSIDE Public Accounting for more than 10 years. They are one of the best sources for breaking industry news, articles, practice management analysis and best practices within the profession. All firm leaders should consider IPA as a trusted advisor in the industry.”

– Jamie Ellis
Katz Sapper & Miller
What Makes INSIDE Public Accounting Unique

INSIDE Public Accounting is different than other publishing companies. IPA’s annual award-winning National Benchmarking Report and the monthly newsletter has earned it the respect of the top minds in the accounting profession and remains independent from outside governing bodies.

For close to four decades, firm leaders have entrusted IPA with their firms’ financial and operational data to compile one of the longest-running, most comprehensive benchmarking studies within the profession. More than 575 accounting firms participate annually in IPA’s benchmarking survey, which benchmarks firms ranging in size from more than $1 billion to $1 million across North America.

The survey is the basis of all that is done at IPA, as it provides the information that is analyzed in the benchmarking report and in newsletter articles that aim to help leaders push their firms to grow, become more profitable and better serve their clients.

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570+ Accounting Firms
IPA 100 – The Big 4 firms and firms above $37 million in net revenue
IPA 200 – Firms ranging from $37 million to $16 million in net revenue
IPA 300 – Firms ranging from $16 million to $10 million in net revenue

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a) Independent third-party verification of data.
b) Streamlined data collection alleviates survey fatigue and frees up staff for other high-value activities.
c) Apples-to-apples comparisons.
d) Ongoing analysis is available to all participants, including international firms.

WHAT YOU CAN EXPECT

a) All confidential firm data, including salaries, compensation, income, etc., will held in strict confidence.
b) IPA conducts a thorough review of each survey submission for commonly missed areas and for any and all errors.
c) The opportunity to be included in the largest annual management of an accounting practice (MAP) survey in the country. Your firm will be benchmarked with more than 570 firms and may be ranked among this year’s top firms in the IPA 100, IPA 200, IPA 300 and the coveted IPA Best of the Best Firms in the nation.
d) A complimentary copy of the August issue of the award-winning INSIDE Pubic Accounting newsletter. This issue highlights the annual IPA 100 firm rankings, along with a detailed financial and operational analysis of the rankings.
e) An electronic complimentary copy of the Executive Summary of the IPA National Benchmarking Report. If you participate in the Internal Operational surveys, you will also receive a complimentary executive summary when published in September.
f) You will receive preferred pricing on the IPA National Benchmarking Report, the Internal Operational Reports and other benchmarking items.
g) You will get preference for selection in articles written by IPA throughout the year. This is an excellent opportunity to market your firm.
INSIDE Public Accounting’s Internal Operational Reports

Dive deeper into the inner-workings of firms across the nation. Uncover trends, compensation data, benefits offered, key process and policies, along with the newest technology / software that firms are utilizing to take them into the future.

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- Firm Administration Report
- Human Resources Report
- Information Technology Report
INSIDE Public Accounting’s  
Financial and Operational Report Card

The INSIDE Public Accounting Financial and Operational Report card is a one-page snapshot of your firm’s overall performance in 22 metrics compared with 587 survey participants, firms in your revenue band and the IPA Best of the Best firms. The Report Card – broken out by top, middle and bottom quartile – allows you to quickly see where your firm is doing well and the areas that may need extra attention.

THE 2017 IPA FINANCIAL AND OPERATIONAL REPORT CARD

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OPERATIONS

| Charge Hours per Professional Staff (Excl. Eq., Prtnrs.) | 1,281 | 366 of 473 | 1,401 | 107 of 139 | 1,401 |
| Utilization (All Professional Staff Incl. Eq., Prtnrs.) | 60.1% | 375 of 468 | 68.3% | 17 of 137 | 66.8% |
| Utilization (All Professional Staff Excl. Eq., Prtnrs.) | 63.1% | 380 of 475 | 72.5% | 16 of 137 | 70.0% |
| Charge Hours by Professional Staff Percentage (Excl. Eq., Prtnrs.) | 79.9% | 376 of 472 | 86.4% | 21 of 137 | 89.1% |
| Personnel Costs as Percentage of Revenue | 44.0% | 191 of 476 | 49.6% | 14 of 137 | 49.5% |
| Professional Staff: Administrative Staff Ratio | 4.6 | 368 of 503 | 5.6 | 10 of 133 | 6.6 |
| Professional Staff: Equity Partner Ratio | 5.4 | 377 of 501 | 7.9 | 15 of 143 | 9.4 |
| AR - Days of Production Locked Up | 34.3 | 76 of 480 | 60.0 | 21 of 137 | 66.5 |
| WIP - Days of Production Locked Up | 22.7 | 222 of 482 | 30.2 | 30 of 130 | 22.5 |

NET INCOME

| Net Income as Percentage of Revenue | 34.8% | 118 of 475 | 31.5% | 32 of 137 | 27.9% |
| Fully Loaded Net Income as Percentage of Revenue | 13.2% | 259 of 450 | 13.8% | 33 of 129 | 14.2% |
| Net Income Growth Rate (Organic Only) | -0.9% | 326 of 465 | 7.7% | 16 of 135 | 5.4% |
| Net Income per Charge Hour | $60.88 | 114 of 459 | $50.48 | 37 of 135 | $46.88 |
| Full Loaded Net Income per Charge Hour | $29.54 | 240 of 458 | $25.01 | 15 of 135 | $24.27 |
| Net Income per Equity Partner | $342,018 | 329 of 468 | $340,000 | 30 of 130 | $340,000 |

COMPENSATION

| Average Equity Partner Compensation | $238,557 | 351 of 469 | $410,556 | 109 of 135 | $438,566 |
| Average Non-Equity Partner Compensation | $179,852 | 250 of 307 | $189,521 | 100 of 135 | $204,563 |
| Average Professional Staff Compensation | $78,258 | 171 of 483 | $73,161 | 51 of 133 | $77,654 |

KEY =

TOP 25% of Responses | MIDDLE 75% of Responses | BOTTOM 25% of Responses


The Platt Group LLC / INSIDE Public Accounting 4600 W. 10th St., Suite 125-197, Carmel, IN 46032 Phone: (317) 733-1930 Web: www.insidepublicaccounting.com

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The subscription-based monthly newsletter features trends, strategies and next practices that public accounting firms are using to move from idea to execution. You will find in-depth interviews with leaders of the Best of the Best firms, most-admired peers, and the top influencers around the country and the globe.

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**SAMPLE REPRINT BELOW**

![Sample Reprint](image-url)
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“IPA provides an in-depth view of the profession. The monthly articles provide timely information, which helps to keep me and my firm up-to-date with trends and how we can benefit from the ongoing change in the profession.”

“During times of change, firms can’t get an accurate gauge of performance by comparing to years past, so tools like the IPA National Benchmarking Report are more important than ever.”

“IPA is a leading industry source of information through its newsletter, the PRIME Symposium, and the benchmarking report for many years by providing everyone in the industry with timely news on what’s happening in the industry...from mergers to other key developments, trends, sound perspectives, future expectations and advice for sound practice management.”

"I love the profession and completely respect The Platt Group and INSIDE Public Accounting for their consistent contribution to make our profession better. I refer firm leaders to the IPA benchmarking report and appreciate the in-depth reviews and analysis of data from firms across our profession."

“Thank you for all you do for our profession. We truly appreciate the data, articles and ongoing news.”

Contact Us

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