THE ANNUAL
INSIDE PUBLIC ACCOUNTING
INFORMATION TECHNOLOGY REPORT

2018 survey and analysis conducted by: The Platt Group / INSIDE Public Accounting
The Independent Gold Standard of Accounting Firm Benchmarking Since 1990

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THE 2018 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

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. Some of the questions in the survey are analyzed based on total number of responses to the survey; some are based on the total number of responses to a particular question. We analyze the survey results in the way that is most meaningful to the reader, and have indicated on many of the tables what the denominator is based on (total responses to the survey or total responses to a particular question) so that it is clear what the percentages represent.
We extend our gratitude to the firms that participated in the eighth 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

The 137 firms that participated in the IPA Information Technology Survey this year include:

47  Firms above $30 Million
26  Firms between $20 Million and $30 Million
43  Firms between $10 Million and $20 Million
21  Firms under $10 Million

NETWORK TECHNOLOGIES

Twenty-seven percent of firms are using servers running Microsoft Server 2008. Less than half have migrated to Microsoft Server 2012, while 15% of servers are using Microsoft Sever 2016.

Dell continues to dominate the hardware landscape, with two-thirds of firms choosing Dell desktops, and 61% choosing Dell laptops for survey participants. HP has 20% market share on laptops, with Lenovo close behind at 17%.

Most firms have switched to Windows 10 as their desktop / laptop operating system this year with 58% using Windows 10 on their desktops and 70% using Windows 10 on their laptops.
Across the country, each IT professional is responsible for working with an average of 40 firm personnel from 35.1 in the Great Lakes to almost 43.2 in the West. This is up from an average of one IT personnel for every 37 FTE in 2017.

Individuals dedicated as IT trainers make up an average of 4% of all IT personnel employed by firms today. Individuals dedicated as IT help desk staff make up an average of 37% of all IT staff in firms of all sizes.
COMPENSATION BY KEY IT POSITIONS

MOBILE DEVICES

Verizon is the clear winner among mobile service providers with 73% 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 3% of firms still using it.
Apple is dominant as the main tablet operating system in use by 37% of all participating firms followed by Windows and Android tablet systems.

Seventy-one percent of participating firms have a Bring Your Own Device (BYOD) plan for cell phones, up from 67% last year. Eighty-six percent of firms in the West region have the plan while only 59% in the Great Lakes utilize a BYOD plan.

Cell phone reimbursements / stipends are highest in the Great Lakes and Southeast, averaging $63 per month, and the lowest are in the Northeast, averaging $51 per month.

CLIENT PORTALS

Ninety-seven percent of participating firms use a client portal, but only 6% report that all clients are using it.

The majority of firms (63%) indicate that client portals aid in document management.

Regionally, the highest satisfaction in this area is in the Great Plains (78%) and lowest in the West (47%).

The top two client portal choices are Sharefile (41%) and CCH Axcess (30%).

INTERNAL SYSTEMS

The majority of surveyed firms (78%) have an intranet, 71% are maintained by in-house staff.

SharePoint is the preferred provider for intranet systems, at 64%.

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.
INTERNAL PROCEDURES

Only 31% 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 (49%). Firms in the Great Plains are the most formalized at 37%, and the Southeast lag behind at 26%. Sixty 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 32% of firms above $30 million, and 52% of firms above $75 million.

CLOUD COMPUTING

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.

CLOUD COMPUTING AT-A-GLANCE

Source: The 2018 IPA Information Technology Report

- The Cloud has made maintenance easier: 78%
- Firm management is more secure with internal structure: 59%
- Overall IT costs GO UP when using the cloud: 46%
- Overall IT costs STAY THE SAME when using the cloud: 46%
- Firm management is more secure with cloud computing: 35%
- Main concern using the Cloud: Loss of Control: 35%
- Main concern using the Cloud: Loss of sensitive data: 25%
- Main concern using the Cloud: Cost: 21%
- Foresee internal costs reduced in the next 18 months: 11%
- The Cloud has made maintenance more difficult: 9%
- Overall IT costs go DOWN when using the Cloud: 7%
**EXECUTIVE SUMMARY**

Loss of control is once again cited as the biggest concern - identified by 35% of survey respondents. Firm leaders are less fearful of losing sensitive data, with just 25% of firms indicating that as their main concern.

IT maintenance of applications is easier when using the cloud, according to 78% of respondents.

Cloud-based applications are being used more frequently across the board, and continue to be dominated by client portals (83%), research (82%) and payroll (65%).

**APPLICATIONS CURRENTLY RUNNING IN THE CLOUD**

Source: The 2018 IPA Information Technology Report
ARTIFICIAL INTELLIGENCE / CYBERSECURITY

Half of participating firms are proactively learning and researching artificial / augmented intelligence.

Nine percent of all participating firms are actively investing and testing prototypes, with the Great Lakes and West regions leading the investments, 12% of firms indicate this response.

Cybersecurity is a growing concern, with 79% of all firms making changes in their systems, software or policies due to cyber threats.

Firms are addressing cyber threats by: educating their staff, creating written policies, software, hardware and outsourced options.

PLATT’S PERSPECTIVE: DIVING INTO THE WORLD OF BIG DATA

In early 2018, IPAs leadership team took the opportunity to attend the four-day Gartner Data Analytics Summit in Dallas. Nearly 4,000 data engineers, data scientists, chief data officers and other dedicated analytics professionals gathered to discuss the latest trends in predictive analytics, Big Data, blockchain, business intelligence platforms and artificial intelligence.

With thousands of the smartest people in the field sharing best practices and success stories, we were overwhelmed with where the technology is going and excited about the amazing possibilities for the future.

Identifying, capturing, storing, analyzing and harvesting massive amounts of consumer data is the holy grail for most companies. The majority of attendees came from Fortune 500 companies with multi-million-dollar budgets dedicated to leveraging and customizing services and products to individual customers. (As an example, think about how Amazon or Netflix “suggest” your next purchase based on past behaviors.)

It’s not surprising that the accounting profession is far behind corporate America in taking advantage of available data and harnessing it to build the enterprise. The bigger takeaway for me is that so few firms even recognize what kinds of data they have, never mind its value and potential.
Most firms don’t have the resources to hire data analytics professionals and implement new technologies at the scale discussed at the Summit. A handful of firms can capitalize on some of these opportunities, and are making strides to do just that. But where does this leave the other firms? What should they be doing right now to get on the bandwagon?

Leaders can:

✓ Acknowledge that this trend of micro-experiences [Amazon- and Netflix-type recommendations] for customers is not going away.
✓ Recognize that Fortune 500 companies are targeting your clients using these data analytics efforts, which are shaping their view of how business is conducted.
✓ Understand that you can access much of the same kind of customer data today - the challenge is how to harvest it.
✓ Stay up to date on the latest in analytics, artificial or augmented intelligence, blockchain and other new technologies, and play out scenarios among your leadership team as to what you could do with the new technology once you have access to it. Better yet, bring in your younger leaders to take control of that discussion.
✓ Embrace the idea that your knowledge of clients, their challenges and their opportunities can be used to create a lot of the unique-to-each-customer experiences that larger companies are trying to deliver. You have an advantage over companies like Amazon or Disney because you are much closer to your customers and you understand the nuances of what they are looking for. Make sure you maximize this advantage.

What was the biggest lesson garnered at the Gartner Summit? The accounting profession needs - once and for all - an ‘all-in’ mental shift. Firm activities should not be viewed as a series of transactions (“we do tax returns and audits each year”) but as part of a continuous, trusted relationship with clients. Through these connections, firms can uncover issues specific to each client and help find solutions, even if the answers lie outside the world of accounting. Then - and only then - can your firm deliver personalized services on par with what your best customers are already receiving from the Fortune 500 companies that are spending millions of dollars to serve them today.

Editorial Note: This article appeared in the April 2018 issue of INSIDE Public Accounting.
INSIDE PUBLIC ACCOUNTING’S EXCELLENCE IN FIRM CULTURE SURVEY AND AWARD

SCHEDULED FOR MAY 2019

APPLY FOR THE 2019 IPA EXCELLENCE IN FIRM CULTURE AWARD.

IPA is excited to announce the addition of the Excellence in Firm Culture survey and corresponding award to the portfolio of our services.

For decades, IPA has been a trusted resource to firms with innovative concepts to improve their firms. Our mission continues to be to assisting firm leaders in making their firms more efficient, growth-minded, profitable and forward-looking.

Whether we are researching the latest trends, benchmarking the leading firms, surveying key staff, or working with leaders to share and garner knowledge, we are always looking for ways to help firms achieve their potential.

APPLY TODAY

https://tinyurl.com/ipaculture

There is no cost, or commitment to submit your application.
### FIRMWIDE PERSONNEL

#### Personnel Count (FTE)

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<tr>
<th>FIRM SIZE (Net Revenue)</th>
<th>Help Desk Personnel</th>
<th>IT Trainers</th>
<th>Network Admin.</th>
<th>Other IT Personnel</th>
<th>Outsourced Providers</th>
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<td>All Non-Big 4</td>
<td>3.4</td>
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<td>&gt;$75 Million</td>
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<td>Great Plains</td>
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<td>West</td>
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WELCOME TO INSIDE PUBLIC ACCOUNTING

About Us

The Platt Group / INSIDE Public Accounting (IPA) 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 publications, along with other benchmarking tools, assist leaders in making their firms more efficient, profitable, innovative, forward-looking and attractive to a new generation of professionals.

INSIDE Public Accounting is dedicated to helping firm leaders, and their firms, achieve their ultimate potential. Whether we 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 collects and analyzes more financial and operational data than anyone in the public accounting profession. IPA is the independent leader for the profession, and is not tied with a consulting or association division.

Firm leaders have trusted IPA with their firms’ financial and operational data for more than 30 years to compile one of the longest-running, most comprehensive benchmarking (MAP) reports within the profession. Annually, hundreds of firms participate in IPA’s survey, which benchmarks firms ranging in size from $1 million to $1 billion across North America. IPA’s annual award-winning National Benchmarking Report and the monthly newsletter have earned the respect of the top minds in the industry.

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.
INSIDE Public Accounting’s Survey & Analysis of Firms

Gain your competitive advantage and grow your firm with industry insight from the independent benchmarking leader in the nation.

The IPA Annual Survey and Analysis of Firms is one of the longest-running and most comprehensive Management of an Accounting Practice (MAP) surveys in the U.S. The survey is open to all firms in North America and launches in January every year. All data collected, including salaries, compensation, income, etc., will be held in strict confidence.

Participants are benchmarked against more than 570 firms and may be ranked among this year’s IPA 100, IPA 200, IPA 300 and the coveted IPA Best of the Best firms in the nation.

ADVANTAGES OF SURVEY PARTICIPATION

• A complimentary copy of the August issue of the IPA newsletter. This issue highlights the annual IPA 100, IPA 200 and IPA 300 firm rankings, along with a detailed financial and operational analysis of the rankings.

• A complimentary electronic copy of the Executive Summary of the IPA National Benchmarking Report. If you participate in the Internal Operational survey(s), you will also receive a complimentary executive summary when published in September.

• Preferred pre-publication pricing on the IPA National Benchmarking Report, the Internal Operational Reports and other benchmarking items including the Financial and Operational Report Card.

• Preference for selection in IPA articles throughout the year. This is an excellent opportunity to market your firm and leaders.
INSIDE Public Accounting’s National Benchmarking Report

The result of the IPA Annual Survey and Analysis of Firms is the annual IPA National Benchmarking Report, which is one of the longest-running, most complete, independent sets of economic and management statistics available about the profession.

The national report includes aggregated data on more than 300 data points analyzed and broken out by revenue bands and geographical locations.

Firms that fully participate in the annual IPA Annual Survey and Analysis of Firms receive a complimentary Executive Summary of the findings.

“At Smith & Howard, we use the IPA National Benchmarking Report for comparability with prior years to see how we can improve and help us focus on areas needing emphasis. We also look at favorable trends and be sure we are doing more of those things.”

– John Lucht, MP, Smith & Howard

VIEW THE EXECUTIVE SUMMARY OF THE NATIONAL BENCHMARKING REPORT

Includes Table of Contents, Analysis and Selected Data Tables

Association Partnerships

IPA is pleased to partner with some of the leading international associations to offer services, tools and resources not found elsewhere. Partner association members receive full access to the benchmarking report. If your association is interested in partnering with IPA, please contact survey@plattgroupllc.com.
The IPA Financial and Operational Report card is a one-page historical snapshot of your firm’s performance in 23 metrics compared with all IPA survey participants, firms in your revenue band and the current IPA Best of the Best firms. The Report Card – broken out by top, middle and bottom quartiles – allows you to quickly see where your firm is doing well and the areas that may need extra attention.

“GBQ has been avid subscriber to the IPA Financial & Operational Report Card which shows our ranking compared to all firms and firms of our size. We share this to let our associates know which of these metrics GBQ has been successful at compared to our peers, as well as those from which we need improvement. We also track our standing in these measures year by year to track the trend of these metrics compared to our peers. These metrics have been extremely valuable in not only assisting us in managing our business, but also giving our associates an understanding of the trends and benchmarks across the industry.”

– Shaun Powell, Director of Finance, GBQ Holdinas
The Monthly Subscription-Based Newsletter

The Award-Winning Newsletter for Leaders within the Accounting Profession

The IPA 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.

Complimentary Samples

IPA features information on benchmarking trends, practice management and, of course, the latest breaking news. IPA’s goal is to inform firm leaders of successful strategies to help their firms succeed. Turn information into action with IPA.

Have news to share? Email editor@plattgroupllc.com with story ideas.

“As a subscriber, I find items extremely valuable and interesting information as we manage our firms. From Platt’s Perspective, to Top Consultants to the CPA Profession various thoughts, to interesting operational statistics to trends that are affecting our profession, the IPA newsletter is full of information that our firm uses.”

– Kelly Bernakevitch, Executive VP, MNP LLP
The IPA INSIDER, INSIDE Public Accounting’s complimentary electronic e-newsletter, highlights information on firm mergers, partnership issues, benchmarking trends and other key developments in the ever-evolving, fast-paced profession.

Follow news on the top firms across North America, read profiles on thought leaders and stay up-to-date on results from IPA’s annual survey. Sign up today to the IPA INSIDER which is emailed directly to you a few times a month.
Celebrate Your Success

If your firm receives an IPA accolade, or is featured in an IPA article - **CELEBRATE**.

IPA is happy to provide you with complimentary imagery for use firmwide, and for a fee you can receive customized reprints with unlimited publishing rights to distribute to clients, to use in marketing materials, recruiting and more.

“Using IPA’s reprints is invaluable in the sales process. Not only does it provide the help in qualification that we need, but it also shows a third-party endorsement that is key to validating our place in the profession. Every single proposal we issue has IPA attached as a valuable piece of information for us and for the decision-maker.”

– Rob DeMartini, Marketing Director, Armanino LLP
What People Are Saying

“I love the profession and completely respect 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.” - Sam Allred, Director, Upstream Academy

“IPA has been an invaluable resource to me in the management of our firm over the last number of years. I have been educated on current industry trends and best practices through their monthly newsletter, annual benchmarking reports and attendance at their annual PRIME Symposium.” - Stephan Wasserman, MP, Gurney | Schneider

“Every year we look forward to hearing the latest IPA rankings of CPA firms across the US. The personalized reprints that the IPA team helps us craft each year are a great way for us to share our exciting news from year to year.” - Samantha Colladay, Director of Marketing, The Siegfried Group

Contact Us

The Platt Group
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Carmel, IN 46032

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Inside Public Accounting’s readers are MPs, partners and consultants representing Best of the Best firms and thought leaders within the profession. IPA readers are responsible for strategic business decisions that directly impact the success and growth of their firms. You can reach this exclusive group with IPA’s monthly newsletter, online options, annual reports, conferences or a customized plan for key market coverage.

Why IPA?

- Reach the decision-makers at small, mid-size and large firms across the nation.

- Deliver your message alongside highly sought-after reviews and articles accounting firm professionals rely on for best practices.

- Combine web, monthly newsletters, e-news updates, and other products to enhance your message.

- Build awareness, engagement and sales leads through targeted campaigns.
Who’s Behind IPA

Kelly Platt, managing partner of INSIDE Public Accounting and an owner in The Platt Group, has worked within the profession since 1994, Kelly has developed a deep understanding of the inner workings of CPA firms and is a co-founder of AccountingWEB.com. Kelly directs all aspects of IPA’s monthly IPA newsletter and the annual IPA survey and analysis of firms.

Email: kplatt@plattgroupllc.com

Mike Platt, managing partner of The Platt Group, has been working with firms since 1985. Mike has assisted large local and regional firms across North America grow and thrive. Mike brings successful ideas, approaches and information to firms across the globe. A sought-after presenter, Mike specializes in benchmarking trends and analysis, and partner retreat facilitation.

Email: mplatt@plattgroupllc.com
INSIDE PUBLIC ACCOUNTING’S EXCELLENCE IN FIRM CULTURE SURVEY AND AWARD

SCHEDULED FOR MAY 2019

APPLY FOR THE 2019 IPA EXCELLENCE IN FIRM CULTURE AWARD.

IPA is excited to announce the addition of the *Excellence in Firm Culture* survey and corresponding award to the portfolio of our services.

For decades, IPA has been a trusted resource to firms with innovative concepts to improve their firms. Our mission continues to be to assisting firm leaders in making their firms more efficient, growth-minded, profitable and forward-looking.

Whether we are researching the latest trends, benchmarking the leading firms, surveying key staff, or working with leaders to share and garner knowledge, we are always looking for ways to help firms achieve their potential.

**APPLY TODAY**

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There is no cost, or commitment to submit your application.
## 2018 BENCHMARKING TOOLS

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<tr>
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### THE IPA FINANCIAL & OPERATIONAL REPORT CARD*

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*Available to fully participating firms only. Please allow three business days for preparation and delivery. IPA can also provide you with a CUSTOM REPORT CARD. Contact our office for details.

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**Available in PDF only.**

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*Internal Operational Package includes all three PDF reports (Firm Administration, Information Technology and Human Resources).

## INSIDE PUBLIC ACCOUNTING NEWSLETTER

### Newsletter Pricing

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<td>$719/yr</td>
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<td>Firmwide PDF</td>
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Name__________________________________________________________

Firm__________________________________________________________

Mailing Address _______________________________________________

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City __________________________ State __________

Zip ____________________________ Phone ________________

Association___________________________________________________

Email Address_________________________________________________

Amount Due: __________________________

**Payment:**  
Check  
Visa  
MasterCard  
Amex  

Card # ________________________________________________

Exp. Date____________ Security Code ________________

Name ________________________________________________

Billing Address ____________________________________________

____________________________________________________________

City __________________________ State __________

Zip ____________________________

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