



The CPA Technology Wish List

FOR PARTICIPANTS ONLY

Exclusive Pre-Release Preview of Top-Line Results

Study Launched October 2005

This report is made possible largely through the support, interest and involvement of hundreds of working financial managers and accountants – You know who you are. Without you, this study would not be possible.

On behalf of Bay Street Group and your fellow professionals: Thank You.

Note: This report is based on early responses. Final findings may differ.

To obtain a final and complete report of this study, please contact Bay Street Group LLC, rtelberg@baystreetgroup.com, or (914) 674-4531.

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KEY DATA POINTS:

- 1) “Paperless Office (Scanning, storage, etc.)” tops the CPA wish list, at 80%
- 2) “Mobile Office” scores second, at 70%
- 3) Laptop/Notebook PCs are at the top of the shopping list, at 49%.
- 4) 45% are considering new Tax or Accounting Software.
- 5) Among top “concerns,” Client Privacy and Personal Privacy top the list, at 66% and 61%, respectively.

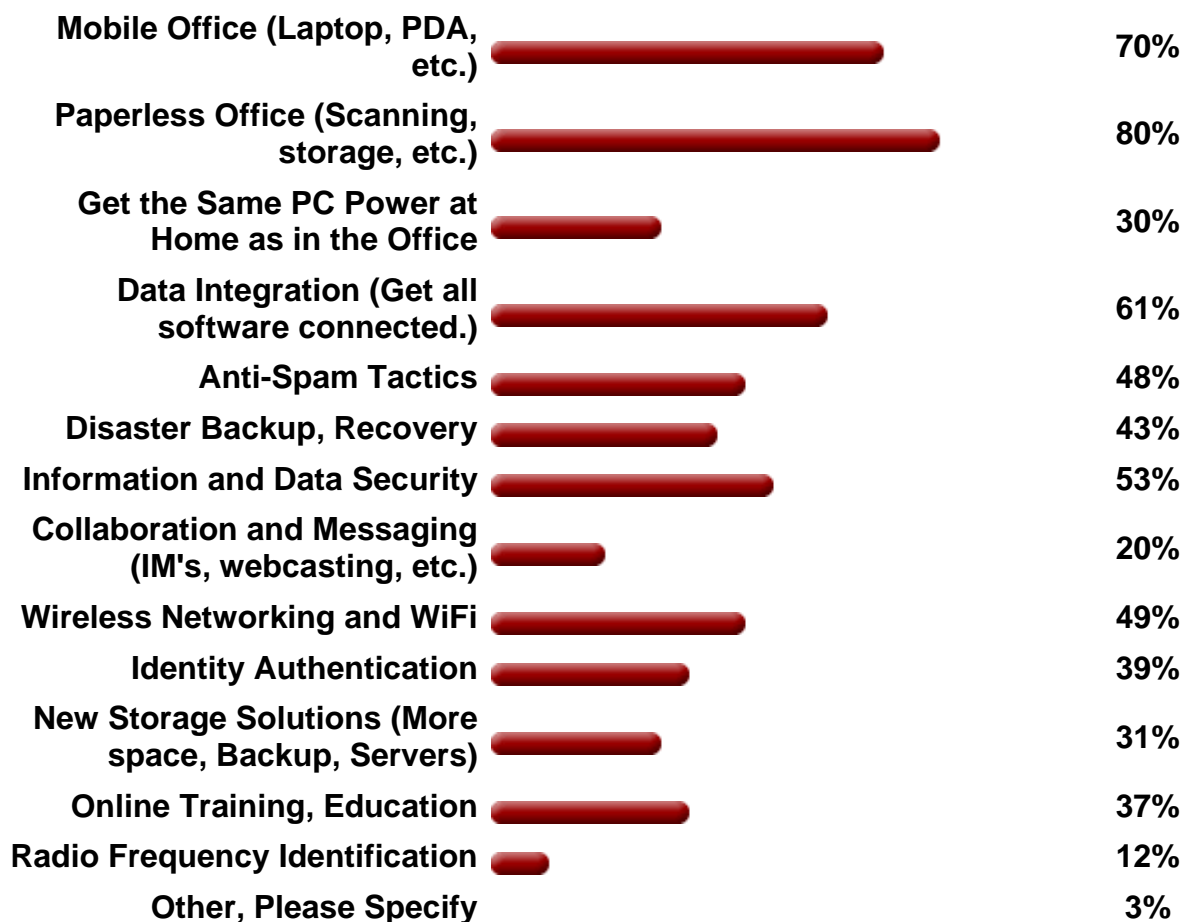
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QUESTIONNAIRE

Which of these key technologies are on your "wish list?" (Please check all that apply.)



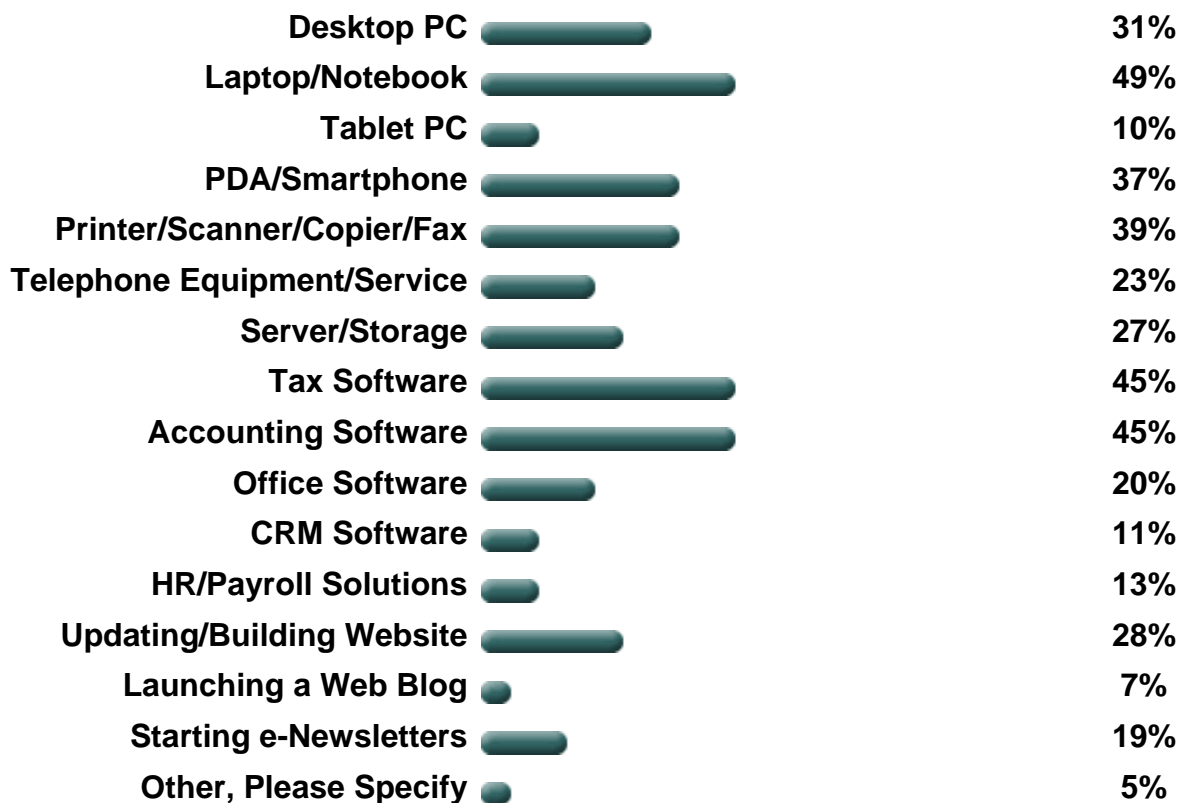
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Which of these items will you be considering for purchase over the next 6 to 12 months?

(Please check all that apply.)



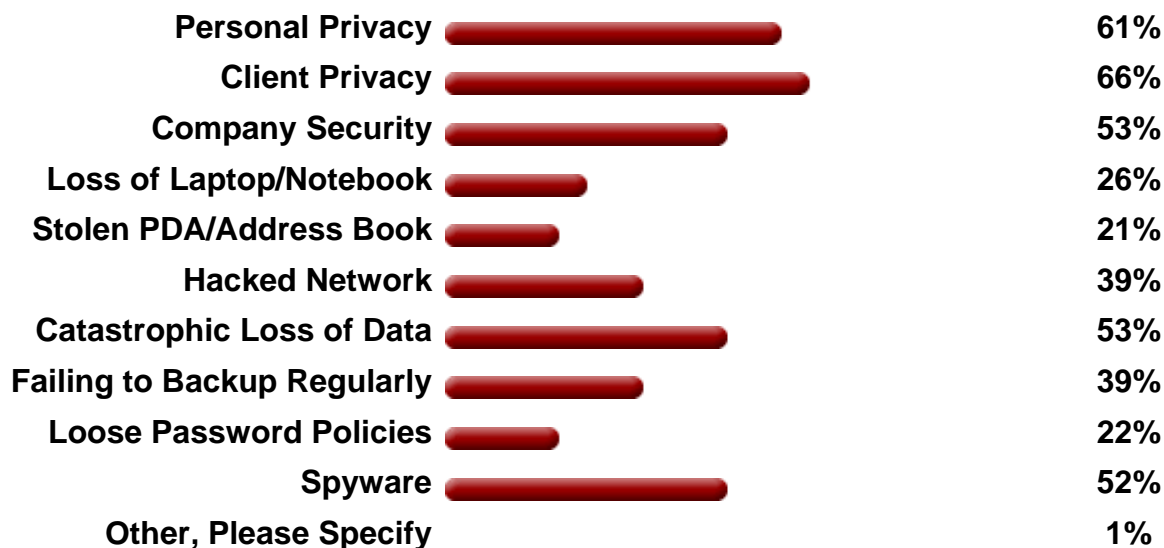
Which of these tech-related DANGERS are you MOST CONCERNED about?

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(Check all that apply)



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VERBATIM

Which NEW TECHNOLOGY, PRODUCT or STRATEGY are you most interested in? Why?

(First 20 responses only.)

1	Going paperless
2	integration of software suites product comparisons of popular software packages for small offices.
3	document management - to reduce physical space for paper and make information more accessible for multiple locations
4	The full integration of software solutions creating a user friendly accounting/tax process.
5	XBRL, standardized reporting
6	wireless, so we can communicate on the move
7	Data consolidation because QuickBooks, Outlook, and my tax software (CCH Pro-system fx) all contain peices of the data i want in one place.
8	Full access to all office resources from home at near network speeds.
9	information and data security
10	High speed access for staff located at client offices to securely access office network
11	Electronic storage of data and electronic communication with clients. As a sole-practitioner CPA with no employees I believe I must continually make myself more efficient by the use of technology.
12	WiFi. Wireless seems to be the future for networking.
13	Paperless Office. Efficiency in handling prior year workpapers.
14	Strategy of a real time close for our company. Knowledge is money and in our business we need to move fast to correct issues.
15	How to move from paper to paperless with limited resources and time? Also, how to have true software integration that works all the time.

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16	DATA LOSS PREVENTION
17	Video conferencing
18	a software universe that works in synch with each other as needed such that my time is more productive.
19	off site backup technology - catastrophe loss protection and spy and advert elimination - to secure internal data
20	xml, .Net Because these new technologies are changing the way our accounting software is working.

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DEMOGRAPHICS

In what type of business do you work?

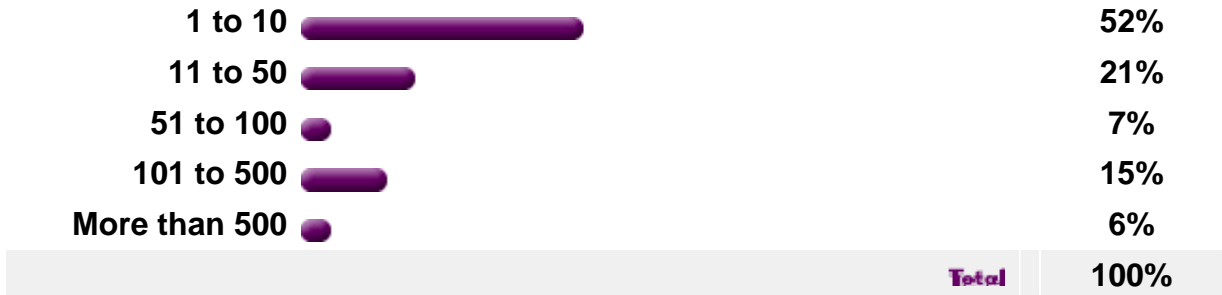
Public accounting		56%
Business or Industry		31%
Government		1%
Not-for-profit		2%
Education		2%
Vendor/Supplier to CPAs/Financial Executives		2%
Other, Please Specify		6%
		Total
		100%

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How many people work in your office or location?



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Which best describes your position?

Chief Executive/Managing Partner		37%
Senior Executive/Partner		29%
Middle Management		21%
Staff		7%
Other, Please Specify		6%
Total		100%

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Rick Telberg is president and chief executive of Bay Street Group. He is a veteran analyst, commentator, publisher, editor, and media executive. As [Editor At Large](#) for the [AICPA Insider](#), he is the profession's most widely-followed commentator. He is also editor of [\[CPA TRENDLINES\]](#), which provides additional news and analysis.

Bay Street Group LLC
 13 Atilda Ave. – Suite 200
 Dobbs Ferry, N.Y. 10522
 USA
www.baystreetgroup.com

Rick Telberg
 Principal Analyst
 Phone: 1 (914) 674-4531
 eFax: 1 (425) 988-7736
rtelberg@baystreetgroup.com

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