

Sage Survey at SleeterCon 2015

sage

04 March 2016



Demographics



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- SleeterCon 2015 in Las Vegas
 - Live survey intercepts
 - 89 responses
 - Must be actively working as an accountant or bookkeeper



Key Findings



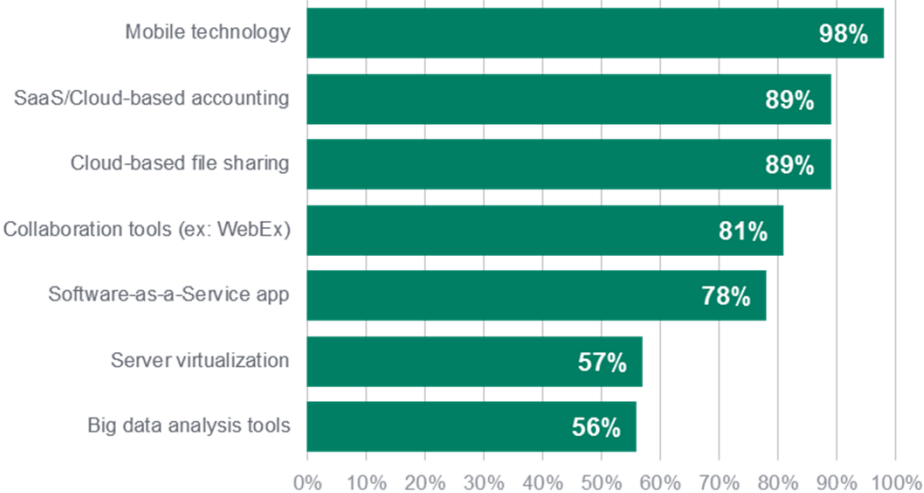
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- Respondents adopting new technologies
 - Clients love the new technologies
 - Respondents also happy with the new technologies

Respondents Adopting New Technologies



- Mobility top new technology (98 percent at least discussing)
- 89 percent involved with both Cloud and SaaS Accounting

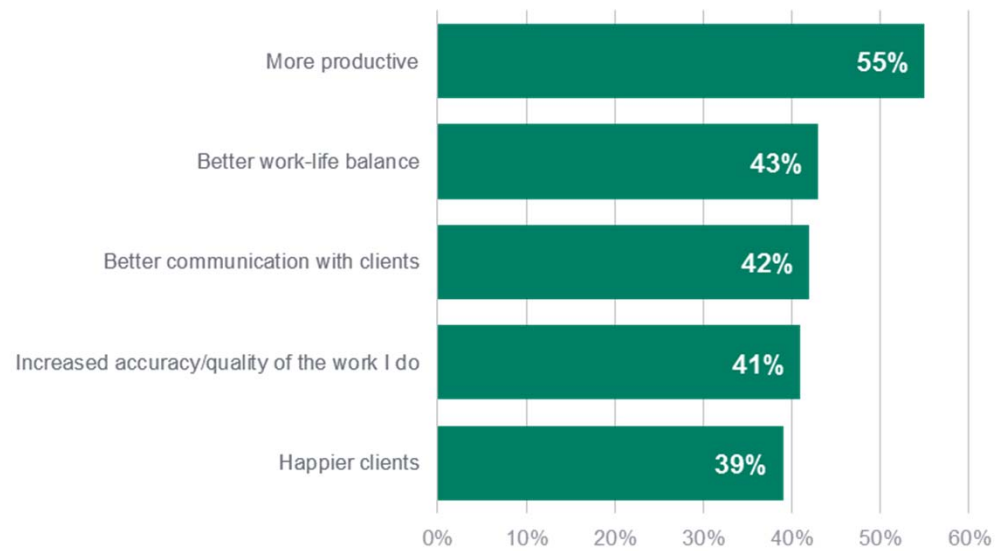
What is your level of engagement with each of the following technologies? (at least discussing)



Goals for Adopting New Technologies:



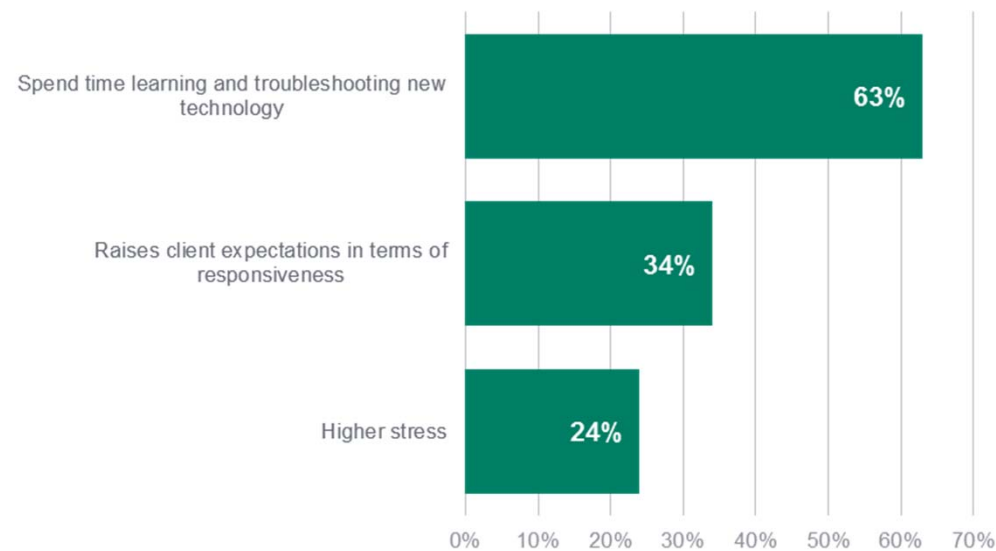
Which of the following benefits do you expect to see this coming tax season as a result of the use of new technology?



Challenges of Adopting New Technologies:



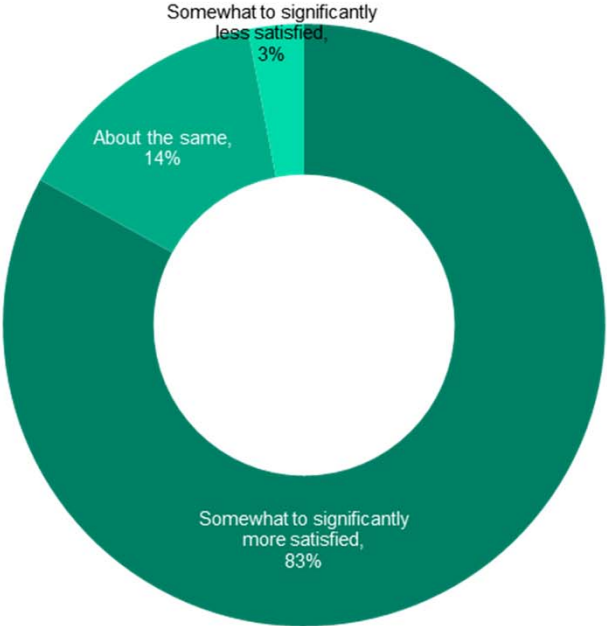
Which of the following challenges do you expect to incur this coming tax season as a result of the use of new technology



Respondents Love the New Technologies



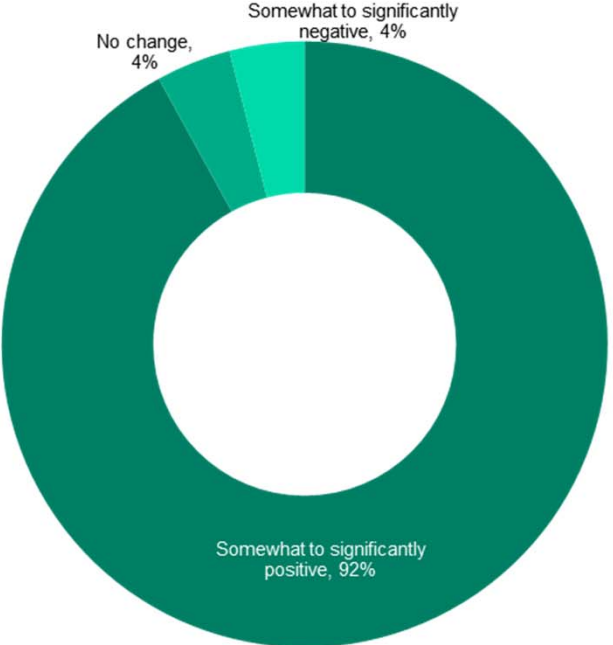
Rate the impact of your firm's use of new technology on your overall client satisfaction level:



Respondents Also Love the New Technologies



Rate the impact of your firm's use of new technology on your overall business:



Recommendations



Look for tools that integrate... or consolidate: Do a deep dive into all of your systems from the business foundation, to social media platforms and try to optimize integration capabilities. Better integration means less duplication of effort. If you can't have great integration, look at consolidation. Implementing tools that will help you consolidate some of your daily processes and systems feels so liberating and will save you time and effort during busy times.

Ask for advice: It can be overwhelming to know which apps will really enhance your life and improve your business. Don't feel like you have to use every technology tool available. Ask your colleagues and trusted peers what apps, tools and software they find most helpful.

Consider what technology will give you a competitive edge: Client expectations are being raised in regards to responsiveness. Clients today need consistent collaboration and communication. An online accounting tool that allows for collaboration and insight sharing in real time helps accountants tremendously. The ability to access client information at the touch of any device raises the level of service and allows for constant collaboration with clients. This allows you to service more clients in a more efficient way.

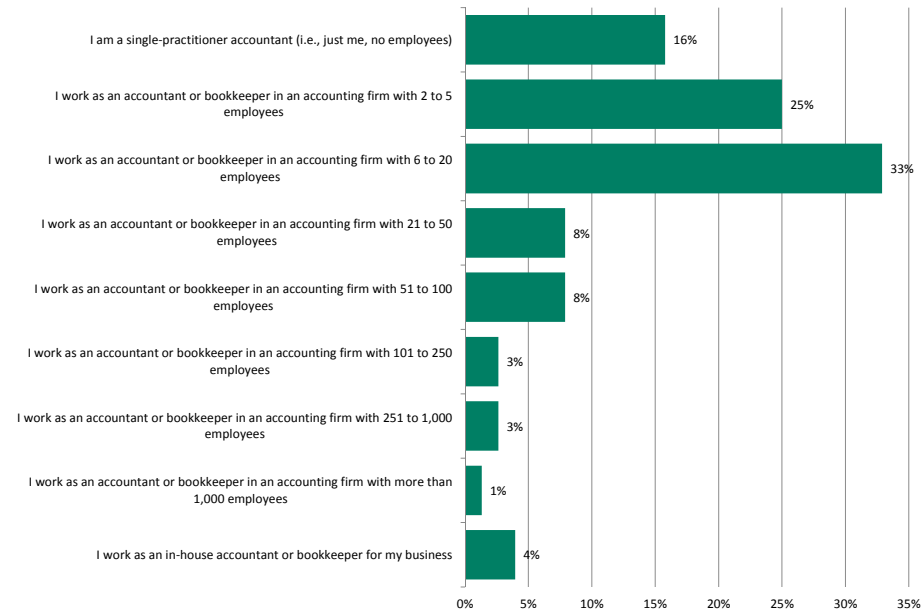
Don't Fear the Cloud, embrace the hybrid model: Security worries and a reluctance to move away from a familiar desktop user experience combine to trump the cost- and time-savings benefits cloud-based apps can provide. The solution does not have to be choosing between the desktop and the cloud, there's also a third option: a hybrid model that leverages the best of both. In most cases you can win by meeting your clients where they are at so if they are still comfortable with desktop, meet them there and help them maximize the solutions they have while building their journey to the future and the cloud!

Consider how technology can provide new services: Technology is a great enabler and can take care of certain tasks, so you can focus on others. What can technology help you do more efficiently, so that you can focus on being a better consultative partner for you clients and provide greater value services and insights?

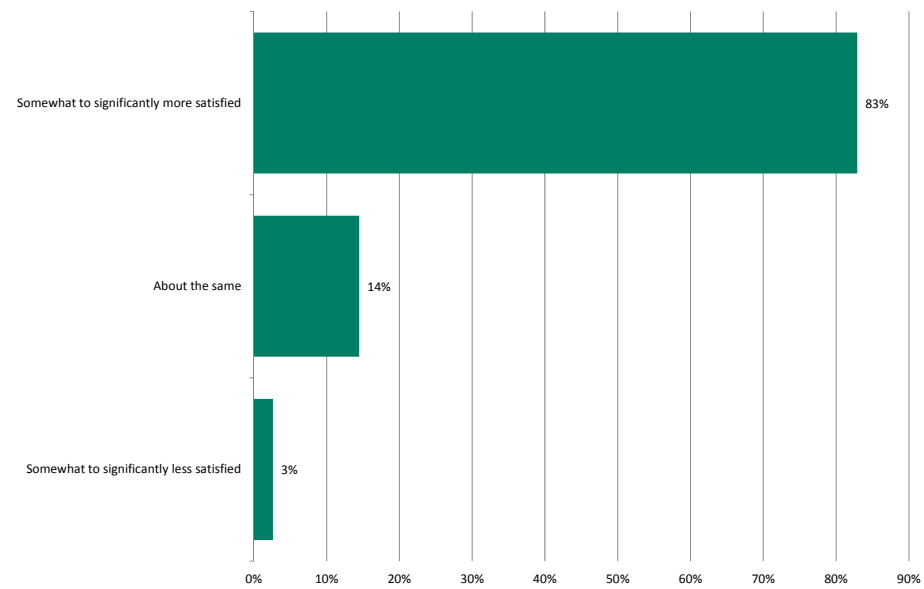
Appendix



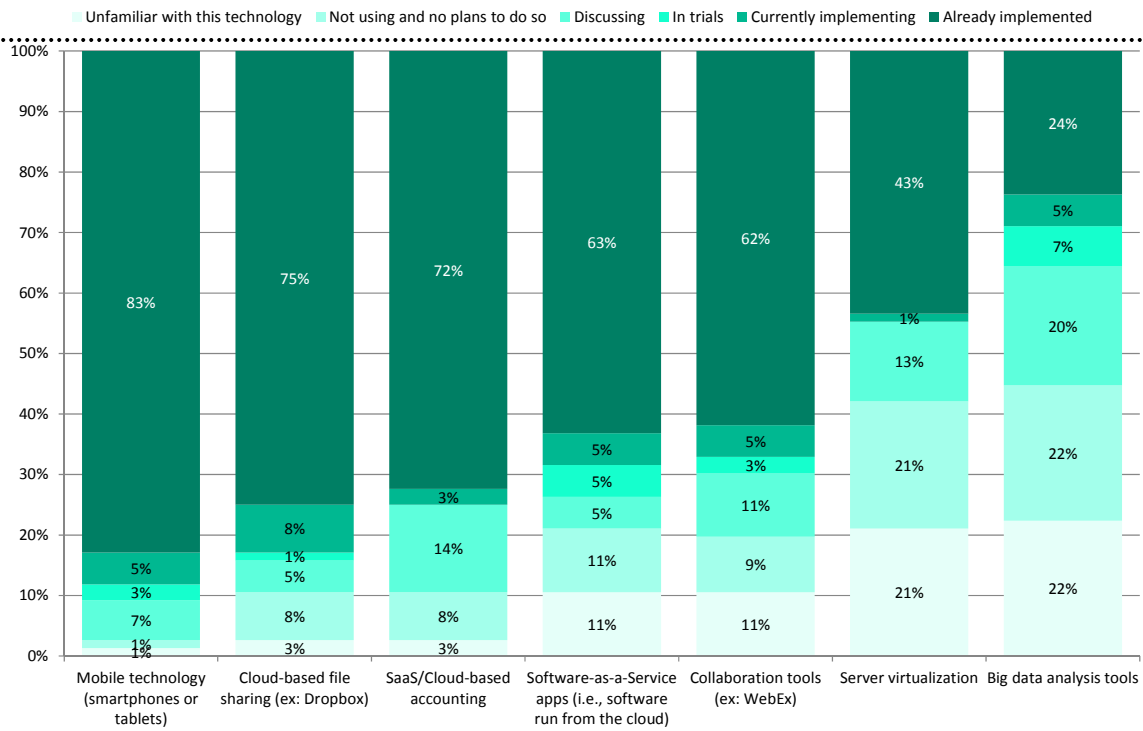
1. Describe the company for which you work:



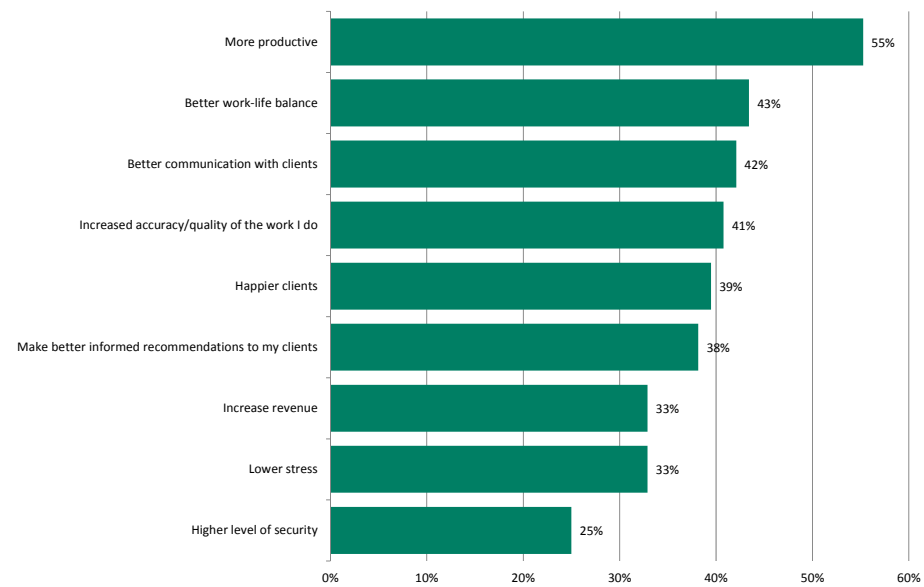
6. Rate the impact of your firm's use of new technology on your overall client satisfaction level:



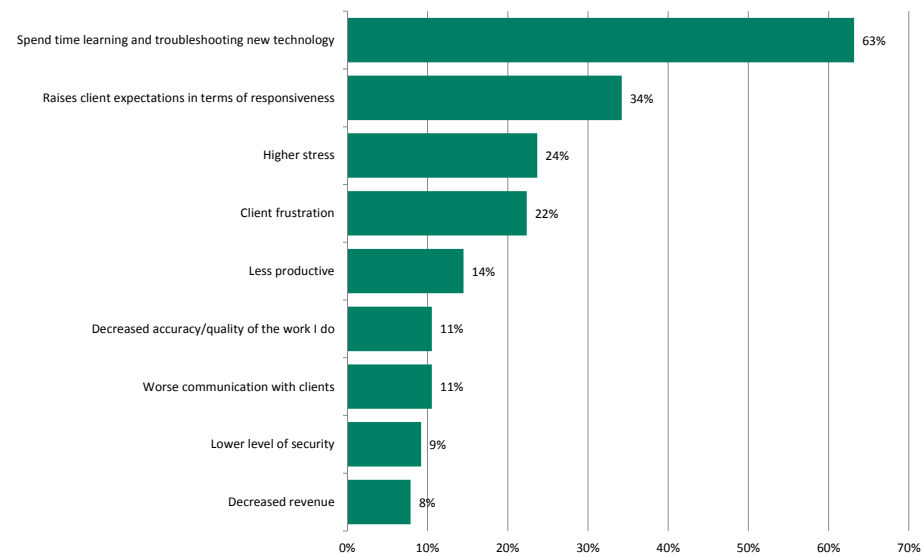
3. What is your level of engagement with each of the following technologies?



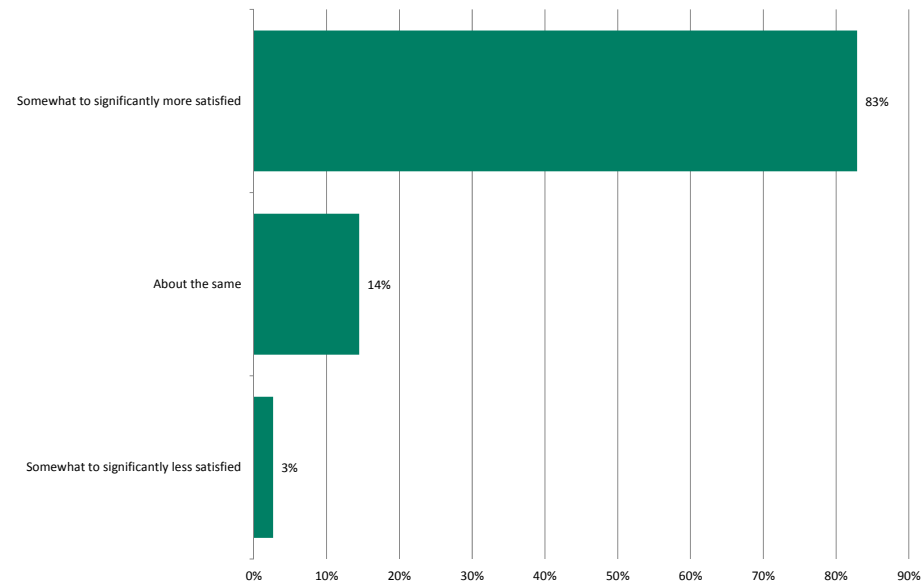
4. Which of the following benefits do you expect to see this coming tax season as a result of the use of new technology? (Mark all that apply)



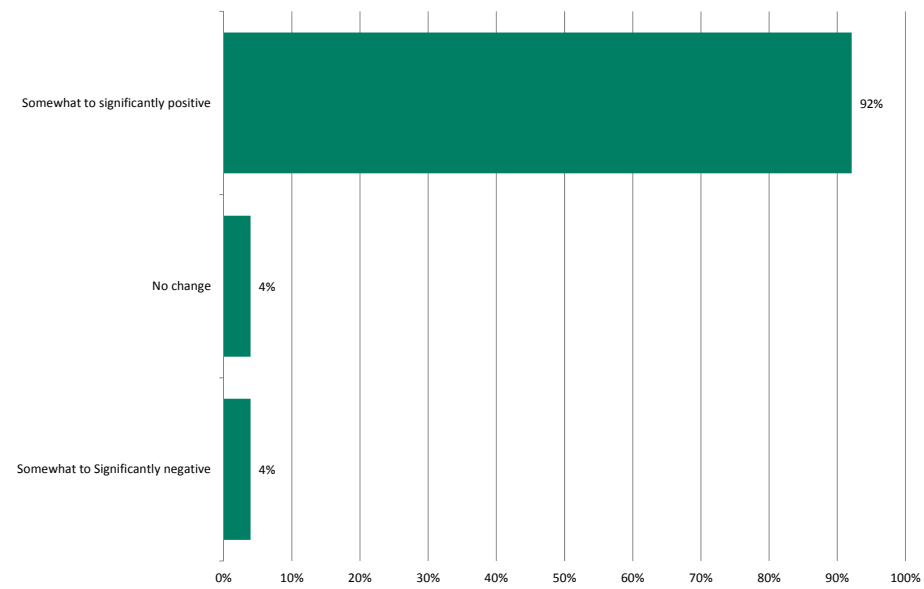
**5. Which of the following challenges do you expect to incur this coming tax season as a result of the use of new technology?
(Mark all that apply)**



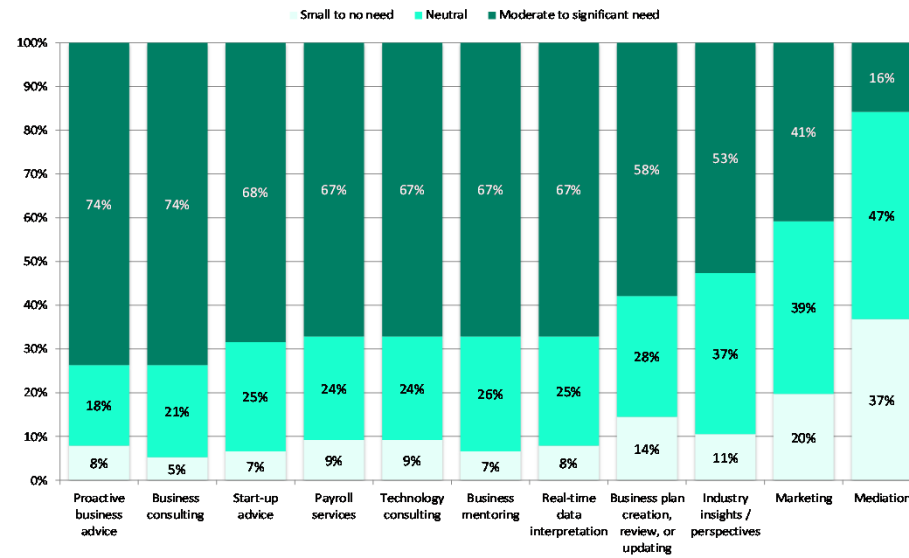
6. Rate the impact of your firm's use of new technology on your overall client satisfaction level:



7. Rate the impact of your firm's use of new technology on your overall business:



8. Rate how much you feel your clients need outside help from an accountant in each of the following areas that go beyond what might be viewed as 'traditional' accounting services:



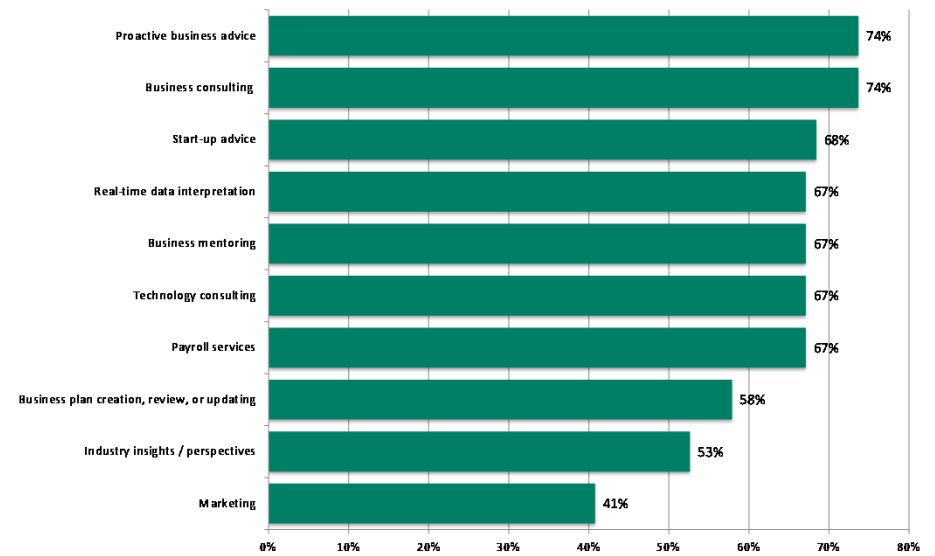
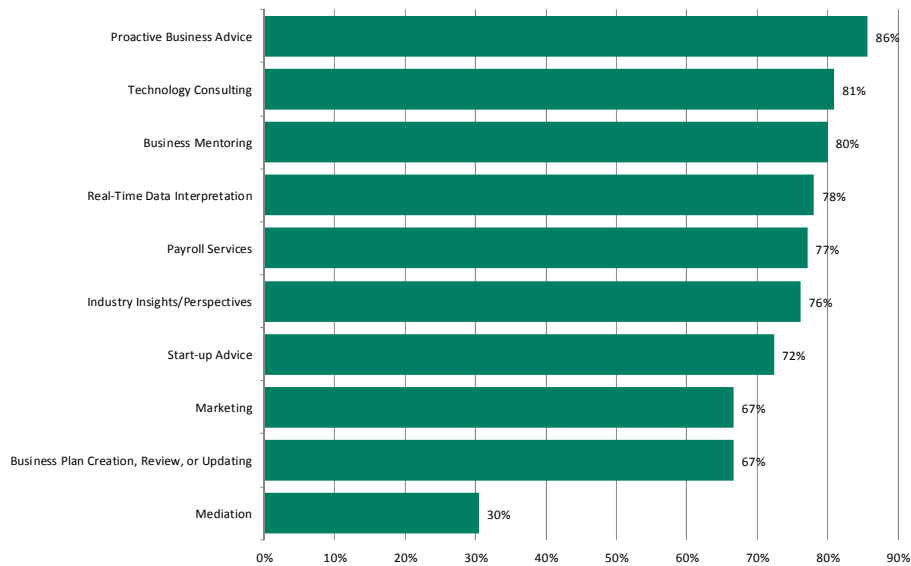


2014 Responses

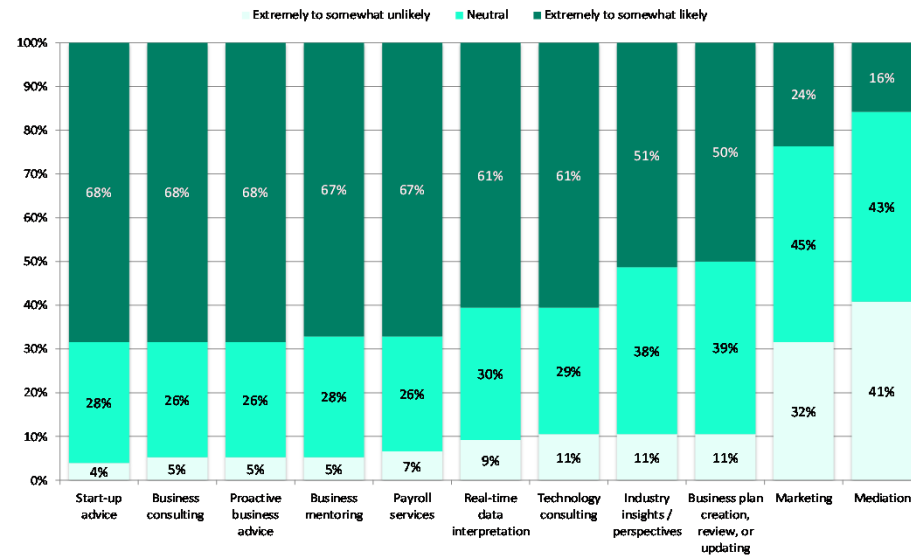
2015 Responses

Q6: Rate how much you feel your clients need outside help from an accountant in each of the following areas that go beyond what might be viewed as 'traditional' accounting services: (Moderate/Significant Need)

8. Rate how much you feel your clients need outside help from an accountant in each of the following areas that go beyond what might be viewed as 'traditional' accounting services: (Moderate/Significant Need)



9. Rate how likely your clients would be to consider your firm to help in each of the following areas that go beyond what might be considered 'traditional' accounting services:

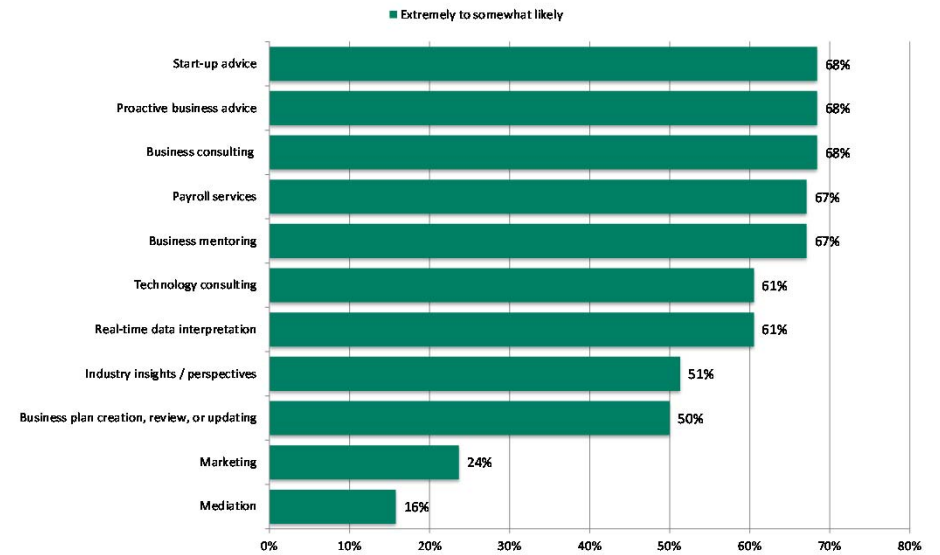
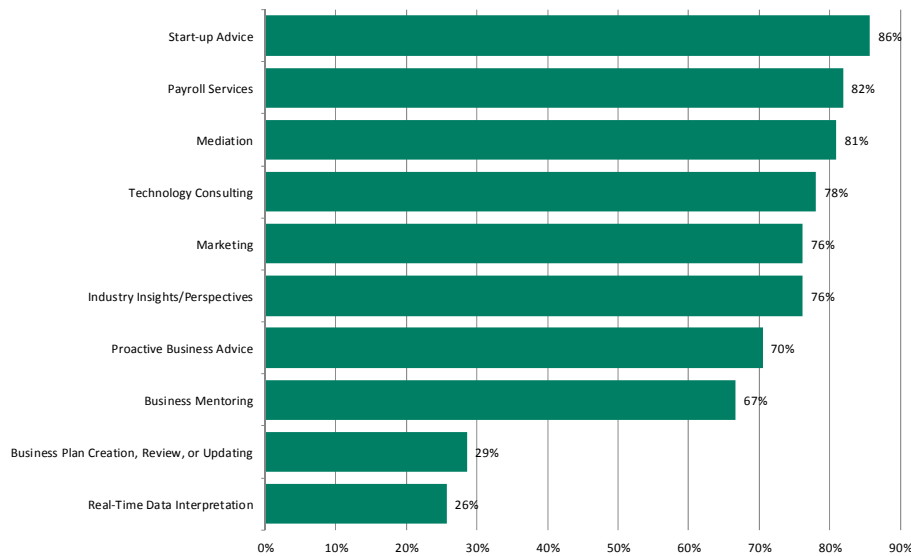


2014 Responses

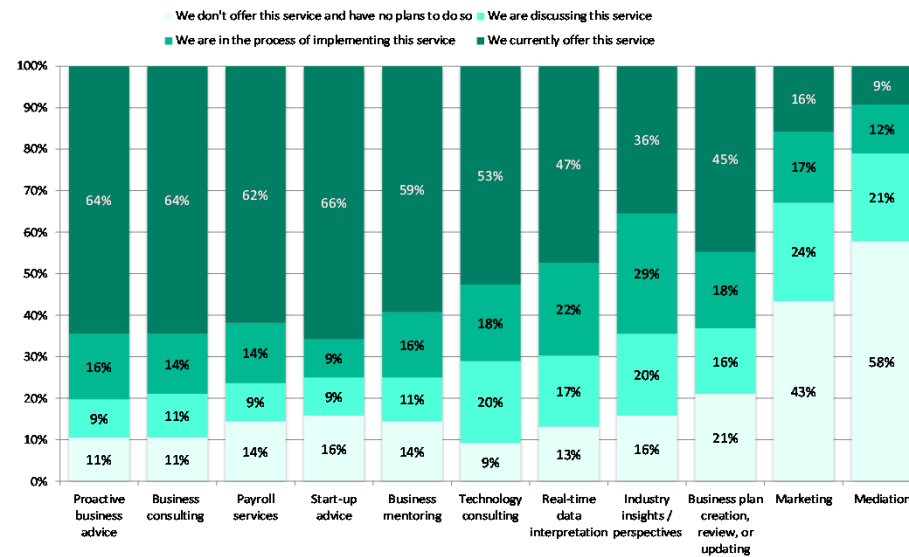
2015 Responses

Q7: Rate how likely your clients would be to consider your firm to help in each of the following areas that go beyond what might be considered 'traditional' accounting services. (Somewhat/Extremely Likely)

9. Rate how likely your clients would be to consider your firm to help in each of the following areas that go beyond what might be considered 'traditional' accounting services: (Somewhat/Extremely likely)



10. Finally, rate how likely your firm is to offer help in each of the following areas that go beyond what might be considered 'traditional' accounting services.

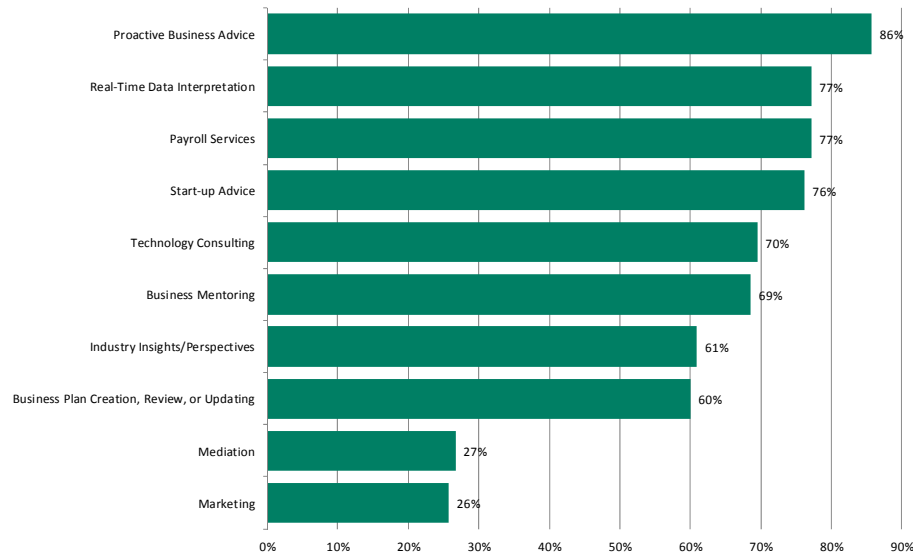




2014 Responses

2015 Responses

Q8: Finally, rate how likely your firm is to offer help in each of the following areas that go beyond what might be considered 'traditional' accounting services. (Implementing/Currently Offering)



10. Finally, rate how likely your firm is to offer help in each of the following areas that go beyond what might be considered 'traditional' accounting services. (Implementing/Currently Offering)

