



Technology Tools for Better Client Service

CPA Technology Advisor
Column: From the Trenches

By [Randy Johnston](#)

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“To help as many people as possible use technology in the way that benefits them most.” Not everyone gets to share their personal mission statement with so many people, but as a frequent reader of this column, you know that I have had the privilege of living my mission statement. More importantly, I take the responsibility very personally and directly for each of you. Before I stake my reputation on a technology, I have to believe it does several things:

- provides a solution to a legitimate problem,
- has a reasonable cost/benefit ratio, and
- can truly make things easier.

I won't claim to be right on every item, but if a baseball player bats .400, they are considered a star. With that in mind, let's consider some special [hardware](#) that may merit some of your hard-earned money.

NEW TECHNOLOGIES WITH A 'COOL FACTOR'

Okay, maybe some of these aren't so new, but these items have a clear place and are very safe bets:

Apple iPhone — This is a wonderful device, but it's focused more on being a great personal device than a corporate device. Still, many of you and your clients would benefit if you had one in hand. (www.apple.com/iphone)

BlackBerry — For email delivery, this is a much more corporate device, but it's very email centric. The ability for IT to remotely wipe this device clean protects your client data. (www.blackberry.com)

Fujitsu ScanSnap S300 — This is a great portable scanner that has duplex (both sides of the paper) scanning capability and is powered off a USB cable, making it exceptionally portable. Fujitsu showed the new S5100 unit at CES in January 2009, and many of you have the larger S510 units already that will be replaced by this next generation ScanSnap. (www.fujitsu.com/us)

MacBook Pro — This is a great personal computer that, when used in conjunction with VMware Fusion, allows you to have the best of all worlds: a reliable operating system, ease of use, and the ability to run PC-based applications. (www.apple.com/macbookpro)

ASUS Eee PC 1000HE 10-Inch Netbook — This product has a 1.66 GHz Intel Atom N280 Processor, 1GB RAM, 160GB Hard Drive, 10GB Eee (Cloud) Storage, Bluetooth, and XP Home, runs for 9.5 hours on a single charge, and at the time of this writing sells for \$374. A great travel machine! (eeepc.asus.com)

Kindle 2 — If you read books, how can you be without this device? Oh, and I guess this doesn't really help a lot with client service ... unless the knowledge you gain by reading makes a difference. (www.kindle.com)

BUT WHAT'S BEEN IMPROVED ENOUGH TO BE USEFUL ... OR IS MUCH MORE BLEEDING EDGE?

How about some digital pens:

- **Mobile Digital Scribe from IOGEAR** (www.iogear.com) — \$99
- **Livescribe Pulse** smart pen (www.livescribe.com) — \$200, paper \$20/pad
- **Logitech** (www.logitech.com) io2 — \$259
- **Wacom Bamboo** (www.wacom.com) — a digital pen with digital mouse pad, computer attached only. Starts around \$79

And voice recognition:

- **Dragon Naturally Speaking 10** is a commercially successful product. It is not 64-bit compliant but it runs in a [Virtual Machine](#) just fine. The product comes with the Phillips VoiceTracer so you can dictate and transfer the file to a PC. The product works fine, but training and patience is required.
- **Vista Speech Recognition** works very well. Training is required, and we have found no Digital Voice Recorder transcriber. Voice Recognition has been a part of the OS since Windows 98, improving with each OS upgrade. The product can be used to start programs or accessories. Speech was in Office 2003 and earlier, but not in Office 2007.

How about VoIP (Voice over Internet Protocol)? We recommend a good quality headset and microphone with the softphone products like:

- **Skype 4.0** — This new version improved audio and video calling, including conference calls. The working plan is for desktop sharing, which could replace some remote support tools. Heavy-duty integration products like VoSKY Exchange PBX-to-Skype application gateways connect Skype to PBX systems.
- **Microsoft Office Communicator R2** — This new version of Microsoft's Unified messaging system allows for a shared desktop, improved video calling, audio calling, conference calling, instant messaging, integration into Exchange 2007, and integration in VoIP phone systems. This could be a very effective way to communicate in the near future
- **In-house VoIP systems** deserve a whole article, but I really like my [TrixBox](#) solution. This is a great fit for small firms.

Cell phones continue to improve, but most don't satisfy my desires and needs. Phones to watch include:

- **Google Android** — Primarily focused on consumers, this product is getting much software that will turn it into a [business](#) instrument. This product will do well when it expands beyond the T-Mobile system.
- **Palm Pre** — Palm announced its new WebOS at CES 2009, as well as the new generation phone. This retires the old Palm OS, and this instrument can be a competitor for iPhone and gPhone.
- **Polymer Vision's RADIUS** — This 3G HSDPA tri-band phone allows worldwide calls and high-speed instant updates from personally selected news sources, special services and email. The Micro SD High Capacity storage ensures easy access to other favorite information and eBooks. RADIUS also features audio capabilities (such as MP3) for podcasts, audio books and music. Most importantly, it has a 5-inch rollable digital paper display.

Not every hardware or software product will make it for the long haul, but the ones included here show a lot of promise. Most importantly, they are legitimate attempts to improve all of our lives through superior technology.