

ACCOUNTING & TAX

Powerful Accounting Solutions

“SmartVault makes my life so much easier. My files are at my fingertips at all times, and when my clients need a file, it's so easy to share them!”



DAWN BROLIN
CPA, MSA

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Core Business

Outsourced CFO services firm, including accounting and solutions consulting

Services

CFO services, small business accounting, solutions implementation, and QuickBooks® consulting

Homebase

Windham, CT

Business Launch

2011

Employees

5

Technology of Choice

SmartVault, QuickBooks, Canon ImageFormula Scanners

Dawn Brolin on making a secure move to the cloud.

Impressed by exceptional data security features and ease of use, Brolin ditched any doubts about the Cloud and got on board with SmartVault

The Background: *Brolin wanted to run a true mobile firm with anytime-anywhere access to files and data—and absolutely no ties to a desktop.*

When Dawn Brolin, sole practitioner of Powerful Accounting LLC, started her firm, she knew that she had to go all mobile. It was the only way she would work.

“I did not want to rely on anything ‘desktop’...applications or computers,” Brolin stated. “I had to be able to work on the road, at events, at client sites, and anywhere else. I wanted everything immediately accessible.”

Prior to launching her own firm, Brolin worked in a desktop environment. Access to files was limited to what was on her laptop or on an onsite server.

“It was a waste of time. Without remote access to files, I couldn’t work to full capacity while on the road. While out of the office, I would make a list of to-do items and then go back and spend several more hours in the office catching up on these administrative tasks.”

Brolin described her past work life as unproductive and frustrating—tied to a centralized, remote-unfriendly system. Today, however, she’s all about web-based solutions. She uses hosted QuickBooks, facilitates training sessions via WebEx™, and has moved to an online document management system—SmartVault. Now she is able to perform tasks and fulfill requests in real-time no matter where she’s working.

“SmartVault makes my life so much easier. My files are at my fingertips at all times. And when needed, I can quickly set up a vault for a client and let the document exchange begin.”

Security Was Never the Issue... It Was the Fear

Brolin now understands that data security was not what deterred her from moving to the Cloud; it was an unfounded fear

“I’ll admit that I followed the sheep when it came to misconceptions about the Cloud and data security. I was scared to give up control of my data to ‘someone’ I didn’t know and couldn’t see,” Brolin admitted.

In fact, she held out for six long years before making the move to the Cloud. It wasn’t until she took the time to educate herself on the security of web-based solutions and see SmartVault in action that she made the leap.

"Once I saw how incredibly easy SmartVault was to use and I educated myself on how much safer Cloud solutions are than sending documents over email, I was sold. I bought SmartVault without even first using the trial," Brolin said.

Like many firms leaders, Dawn Brolin felt a certain level of vulnerability in regards to placing client files somewhere other than an onsite server. However, she quickly learned that her data is much safer using advanced and security-driven solutions like SmartVault.

"Now when I hear accountants say that they avoid moving to the Cloud because of security concerns, I have a great response," Brolin explained. "I ask them how well they know their IT person [which is typically an outsourced third-party vendor]. I remind them that this person also has full access to their data, and then ask why they think they are any less vulnerable to a security breach."

The fact is that Cloud vendors are leading the security march—and SmartVault is in the vanguard. Equipped with encrypted channels for data transfer and authenticated logins, SmartVault provides one of the profession's most secure solutions for sharing and storing documents and data in the oh-so-convenient Cloud.

Top Reasons for Her Move to the Cloud

Driven by a need for full mobility, Brolin is now a dedicated, permanent user of Cloud technology

Being on the road is a necessity for Brolin. Attending events, offsite client training, and a slew of other business related activity requires anytime-anywhere connectivity to her firm. The following are Brolin's key reasons for moving to SmartVault and why she will stay in the Cloud:

- *Incredibly intuitive and easy to set up and use.*
- *Far more secure than sharing documents via email.*
- *Immediate, real-time access to all firm documents.*
- *Quick set-up of client vaults for easy, version-controlled document exchange.*
- *No more being tied to desktop computers and applications.*
- *Work can be performed anytime and from anywhere, eliminating after-hours administrative catch-up work in the office.*