

Peter Margaritis: [00:00:00] Welcome to Episode 9. And my guest today is Byron Patrick, who is Network Alliance's Managing Director, CPA Practice. He oversees Network Alliance's strategic growth within the Accounting and CPA market.

Peter Margaritis: [00:00:12] Now, let me ask you a question. Are you overwhelmed with trying to stay current with the rapid change in technology? Do you have sleepless nights because you fear that someone will hack into your company? Do you need IT help? If so, then this episode is a must listen to because we discuss those questions and many more.

Peter Margaritis: [00:00:35] Now, Byron knows this stuff, and it was evident when the AICPA asked him to present five sessions - That's right, five sessions - at this year's AICPA Engage Conference. Those sessions were Managing a Business/Firm in the Cloud, Latest Internet of Things to Get Excited About, Latest Trends and Strategies, End User Security Awareness, and Prepare for Cyber Attacks Across the Globe. We will cover a lot of ground during this interview, but if there's something specific that you would like to ask Byron, please e-mail him at BPatrick@NetworkAlliance.com.

Peter Margaritis: [00:01:15] Before we get to the interview, let me ask you a question. Does this describe you? When you're giving a presentation to a client or prospect, your heart is racing, your internal critic is working overtime, and all you want to do is have this thing be over even before you start? While you're delivering your message, does your client or prospect look confused, disengaged, or maybe even uninterested? Well, you are experiencing the presentation gap and my new book, *Taking out Numb Out of Numbers: Explaining and Presenting Financial Information with Confidence and Clarity*, will help bridge that gap. To learn more about the book, go to TakingTheNumbOutOfNumbersBook.com. And it's also available for purchase on Amazon.com. So, without further ado, let's get to the interview with Byron Patrick.

Peter Margaritis: [00:02:09] Hey, welcome back, everybody. Today, I'm with my good friend Byron Patrick out of Maryland, former chair of the Maryland Association of CPA's Executive Board. Welcome back, my friend. Good to see you.

Byron Patrick: [00:02:22] Thanks so much, Peter. Good to see you. And really excited to be on again.

Peter Margaritis: [00:02:26] Yeah. I'm looking forward to this conversation because a while back, about mid-June, I had seen you had posted or read somewhere that you were speaking at AICPA ENGAGE Conference, and you did five sessions at ENGAGE, which, one, your topic must have been very hot and very pertinent to the membership and anything around IT these days. We know that it is. But to do five sessions is utterly a superhero type of performance.

Byron Patrick: [00:02:58] Well, thanks. It was, you know. It was a bit of a sprint that should have been a marathon, but it was great that the topics, like you said, were IT. So, incredibly popular. And just that, you know, I was excited for the opportunity that, you know, they wanted to hear from me that much. In the span of three days.

Peter Margaritis: [00:03:20] Well, that says a lot about you, and your business, and how well you do it. So, what was the overarching problem you were trying to solve for the members or teach them how to solve?

Byron Patrick: [00:03:31] I would say, you know, obviously, security is this huge topic, major concern on everybody, front of their face every day. So, a lot about IT security. And then, just other IT topics, in general, trends that are going on. It's such a fire hose of information in today's world. You don't have time to consume it all. So, it was a great opportunity to provide relevant detail that was filtered down into things I felt people could, you know, take away and value.

Peter Margaritis: [00:04:07] Being a solo entrepreneur, I think that's one of my biggest challenges is just the IT aspect of the business, and making sure that I'm backed up, making sure that I'm safe, my information is safe. And it is overwhelming even for just a one-armed paper hanger here.

Byron Patrick: [00:04:28] Absolutely. It's incredibly overwhelming. I speak to new opportunities and clients all the time that are one, two, three-person shops. And you

have the same challenges that a 50 or 100-person shop has with respect to technology, and keeping it up to date, and making sure all the pieces are there. So, you know, being able to assist on that, so you can really focus on what you do and not worry about back-up routines is, you know, where we can bring value to the table.

Peter Margaritis: [00:05:03] Yeah. I got a new desktop, and I forgot to hook up Time Machine on it, and I was working on my book. And, all of a sudden, we got power surge, and I lost my update, and I put a lot of work into that day. And it was completely fried. I couldn't recover from it. I lost probably about 30 pages that day. So, I learned a lot about that. And yeah, I'm backed up.

Byron Patrick: [00:05:31] Yeah, yeah. Probably in triplicate at this point.

Peter Margaritis: [00:05:33] It's actually a duplicate, but I could go triplicate on that because it's just -- You know, I said if I lose my information on the computer, I don't know if I could ever replicate any of the stuff again.

Byron Patrick: [00:05:47] No. It's an incredible amount of work to try to recall and put that all together. I mean, like, just take away the professional side, the personal side, I mean, I've got all my family photos. I've got them on my workstation. I've got them backed up to Amazon Prime. I've got them backed up to Google Photos. And then, I have an extra on a hard drive. I mean, you'll never replicate, you know, memories like that.

Peter Margaritis: [00:06:13] Right, and I've-

Byron Patrick: [00:06:13] And so, we've got to do it.

Peter Margaritis: [00:06:13] I've got stuff out on iCloud, and I've got stuff on Dropbox. And they're probably the exact same thing, but they're just in two places now.

Byron Patrick: [00:06:22] Absolutely.

Peter Margaritis: [00:06:24] Yeah. So, what was one of the topics? What was the topic that had the biggest crowd and that you had most of the attention? You had probably what, a couple of hundred people in the room?

Byron Patrick: [00:06:34] Yeah, absolutely. I would say, definitely, the End User Security session was, you know, standing room only because that was focused on the human element of security. You hear so much about firewalls, and encryption algorithms, and all that noise that kind of makes everybody's eyes glaze over. And my session was focused on what you can do to protect yourself, like not clicking the link, how to recognize threats against you. And 75% of the data breaches occur because of the human element. So, we were discussing, you know, how to try to close that gap.

Peter Margaritis: [00:07:18] And the crooks have gotten craftier these days because a lot of times, I'll see something, and I'll go, "I'm not really sure about this," and I'll send it to my marketing people. And they'll go, "Yeah, this is bad because, Pete, when did you start speaking on strength and fitness?" I went, "Oh, I guess I don't." But I'm able to, at least, look and get an idea. But, you know, if somebody clicks something, I've heard horror stories. I bet you got ton of horrible stories on situations like that.

Byron Patrick: [00:07:52] Absolutely. And to your point, I mean, the crooks now, honestly, have the skill set to be incredibly employable on the marketing side. I mean, their ability to convince us to click, to reply to an e-mail, to allow access, they understand what motivates us as human beings, and they're able to leverage that better than most marketing organizations. So, it's real.

Peter Margaritis: [00:08:22] So, what should the end user be looking for in an e-mail that may look or sound real but is a threat or can hold your computer and data hostage?

Byron Patrick: [00:08:36] Right. So, the first thing is I tell everybody, gut check, even remotely. Like if you feel like you might need to forward that email somebody else to verify it, you probably already know the answer. So, delete and move on. The gut check is number one.

Byron Patrick: [00:08:55] The number two is just anything that is inspiring urgency, or fear, or panic. I can tell you, we do security tests where we send phishing emails to our clients and see who clicks. And, you know, we're helping to teach them what to look for, and put the fear of God that they're going to fail the test and get in trouble with the boss, which protects them. But, you know, the biggest successful phish we did was when the Equifax Breach happened.

Peter Margaritis: [00:09:28] Oh yeah.

Byron Patrick: [00:09:28] This had fake e-mails that said, "Click here to get your credit monitoring." And everybody who had been doing really great passing those tests, they were clicking as quick as possible.

Peter Margaritis: [00:09:39] Right, wow.

Byron Patrick: [00:09:41] Yeah.

Peter Margaritis: [00:09:41] Wow, yeah. And, actually, correct me if I'm wrong, but I did hear that they said that Equifax came out and said if you go to this website, but that was a fraud.

Byron Patrick: [00:09:53] Yes. Somehow, somebody at Equifax got a hold of a link that was a fake website, and they forwarded it via social media to their customers.

Peter Margaritis: [00:10:07] Yeah. Guess who else filled that out and bit that hook because it's coming from them. But even my software, my computer said don't do it. I'm like, "This is weird." I should've known at that point, but I didn't listen. And yeah, luckily, everything's okay, but-

Byron Patrick: [00:10:27] Right, yeah.

Peter Margaritis: [00:10:28] So, when you send these fake phishing, what happens when they click on it? Does your picture show up and go, "You shouldn't have clicked"?

Byron Patrick: [00:10:38] So, it's funny actually. There's a number of different landing pages we can do. A lot of times, I actually just had the page fail to load because if it, you know, has my picture and says, "You shouldn't have clicked," they quickly e-mail all of their buddies and say, "Oh, don't click the e-mail that just came out." So, usually, it just goes to 404 bad website, and, you know, people just move on. But we can put a rickroll video up there. We can do, you know, "Hey, buddy. You clicked the link you shouldn't have." The other benefit is it enrolls them in a short 5 to 10-minute training that they, then, have to complete because they failed the test.

Peter Margaritis: [00:11:25] That's cool. What other topics did you discuss at this user piece?

Byron Patrick: [00:11:30] So, we also talked about the Internet of Things. And just, you know, basically, we're putting IP addresses on toasters, and staplers, and, you know, everything else, and everybody wants to bring them into the office. And, you know, the latest trends going on there and what you should be looking for, especially as you want to introduce the stuff into your office.

Peter Margaritis: [00:11:51] So, what should I be looking for?

Byron Patrick: [00:11:54] Well, one of the big challenges, again, it's going to be security, is all of these vendors are putting IP addresses on all types of analog devices, things that were never smart, never intelligent, and they're not doing it with a lot of forethought with respect to security. So, if you are going to introduce something in your home or in your office specifically, you want to make sure that you're working with the veteran who has put some time and energy into putting security into that device. So, you know, you can't turn a smart speaker into a remote microphone and listen in to all the board of director moments. You know, it could be a challenge.

Peter Margaritis: [00:12:39] Wow, I didn't think about that. You could turn a smart speaker into a listening device.

Byron Patrick: [00:12:46] There you go.

Peter Margaritis: [00:12:46] And you know how to do that.

Byron Patrick: [00:12:49] I plea the Fifth.

Peter Margaritis: [00:12:51] Yeah. I'm thinking, do you ever send me any listening devices or?

Byron Patrick: [00:12:55] [laughs]

Peter Margaritis: [00:12:56] Yeah. Oops, there we go. So, with that end user, we have these tools called Alexa and Google Home. And, you know, she's having trouble connecting to the internet. Did you hear her?

Byron Patrick: [00:13:12] Yeah, I heard that.

Peter Margaritis: [00:13:14] Yeah. So, how do this play into that security aspect?

Byron Patrick: [00:13:18] Well, they are at the very top of the list because these devices, they don't only listen when you send them commands. They're listening to every single thing that you are saying. So, privacy concerns are, you know, rampant with respect to these types of devices, especially in the workplace.

Byron Patrick: [00:13:39] So, there are a lot of conversations where the recommendation is don't bring these into the workplace yet because it hasn't been flushed out of what information is being captured, if that information is being cataloged anywhere, could somebody potentially get unauthorized access to that information. You know, there's all these great opportunities to use these devices potentially in the workplace, but it could come at a cost. You have to weigh that out and, you know, evaluate the risk versus reward.

Peter Margaritis: [00:14:13] Yeah. An attendee shared a story with me about how she caught a crook, a robber, at their office. And she said that she had petty cash, and there's an amount of petty cash because of some fundraising, and came in the next day, and realized some was missing, and knew that she couldn't pull the whistle because she didn't have any evidence. She thought she knew who it was. So, she went out and bought a nest camera.

Byron Patrick: [00:14:42] Okay, yeah.

Peter Margaritis: [00:14:42] Put it on her bookshelf, and then get the alert on her phone that somebody was -- and she looked, and there was the person that she thought. So, she had him dead to rights. But I'm sort of thinking through that. So, basically, somebody could hack into that to watch her and watch the office if, yeah, you're not in.

Byron Patrick: [00:15:07] Yeah, absolutely. There's been stories of crooks gaining unauthorized access to things such as baby monitors, watching the home, and learning the behaviors and activities, and they can figure out when the home is empty and go right in. So, you know, obviously, that goes beyond the home.

Peter Margaritis: [00:15:29] Is there a way to encrypt it or put some security around these devices, so they can't -- Well, no. I guess, they're going in through your WiFi system.

Byron Patrick: [00:15:39] Yeah. And it depends. A lot of these devices, they hook up to your WiFi, but, sometimes, if the crook can just hack into your WiFi, they can then get access to all of the devices that are hanging off your WiFi network. So, that's where you need to make sure that devices you're putting on the WiFi network are segregated, isolated, and they require additional authentication. So, just by virtue of being on the network, I could install the app and potentially gain access to it. You want to make sure it requires additional authentication, passwords, or something.

Peter Margaritis: [00:16:19] Okay. So, my system here, I've got a password required to get into, have access to it. You're saying there's probably a two-step verification process that I could install or it's there and activate. So, if anybody get on the net, then they would-

Byron Patrick: [00:16:38] Yeah, absolutely. And you brought up another good point is that that multi-factor authentication or two-step authentication, a lot of devices, a lot of apps have that, and nobody configures it because, you know, God forbid, that extra 20 seconds to my day to log in is just way too inconvenient. And, you know, it's-

Peter Margaritis: [00:17:01] I just thought of my son.

Byron Patrick: [00:17:04] Right, right. You know, if it's there, man, you got to set that up.

Peter Margaritis: [00:17:11] Yeah. Well, I think I know what I'm going to do after this call is over is to set that up. As we move forward, we're talking about artificial intelligence. And did you talk about AI in your sessions?

Byron Patrick: [00:17:25] It definitely came up as a topic. It wasn't the focus, but yeah. You can't avoid it today.

Peter Margaritis: [00:17:31] Because I finally figured out, all of a sudden, all of these websites had this, "Let's chat," and the person, yeah. And it's a chat bot, right?

Byron Patrick: [00:17:40] That's right. Nine times out of ten, you're talking to a robot.

Peter Margaritis: [00:17:45] Robot. And someone told me that they didn't -- I don't know if this is college or whatever, but, basically, the people thought they were actually talking to a person for over a long period of time when, in fact, they were not. They were talking to artificial intelligence.

Byron Patrick: [00:18:00] Well, and I'll take one step further. After you finish listening to this podcast, go out and google the latest Google assistant that can make phone calls on your behalf, and make reservations at restaurants or for a hair appointment. And it's an actual voice. And the person on the other side has no idea it's a computer calling them.

Peter Margaritis: [00:18:26] Shut the front door.

Byron Patrick: [00:18:28] It is amazing.

Peter Margaritis: [00:18:30] Really. So, I've got Google Home, and I've got Alexa, and I can put stuff on my calendar. So, there's a step even higher than that?

Byron Patrick: [00:18:40] Right. So, where that's going is you'll be able to say, "Hey, Alexa, give me, you know, a restaurant, a nice Chinese restaurant in the neighborhood." "Okay." "Can you make reservations for a Friday night for five?" And then, next step-

Peter Margaritis: [00:18:56] Wow.

Byron Patrick: [00:18:56] ... is calling the restaurant and making that reservation.

Peter Margaritis: [00:19:00] So, the app calls the restaurant and makes the reservation?

Byron Patrick: [00:19:03] That's right.

Peter Margaritis: [00:19:04] "I'm going to make a reservation for," yeah. Can you keep it? I'll let Bill Clinton's voice to be on mine. I'm making reservations for Pete Margaritis' family.

Byron Patrick: [00:19:16] That would be phenomenal.

Peter Margaritis: [00:19:18] So, how do you bring that -- How does that work in the workplace with that type of technology?

Byron Patrick: [00:19:26] Well, think about the administrative assistant's role, and the things that they do to coordinate meetings, to coordinate various travel, things like that. If you can have a bot sitting on your PC, on your desk, or whatever that you can just ask, "Hey, I've got a trip coming up to Las Vegas in June. Coordinate hotel, airfare, and such," and it will just go do it based on your preferences, and even if asked to make phone calls, it will do it.

Peter Margaritis: [00:19:59] And they'll actually make that reservation, airline reservation and hotel reservation for you, but you, obviously, got to be specific with the parameters.

Byron Patrick: [00:20:09] Absolutely, absolutely.

Peter Margaritis: [00:20:12] Can it work on Excel and create databases?

Byron Patrick: [00:20:15] I'm sure it's coming. They've got bots that can do programming and scripting, so, you know.

Peter Margaritis: [00:20:23] And if I think about Grammarly, I use a lot. And that's technically a bot itself because it's grading your homework, grading what you're writing, and providing suggestions and corrections.

Byron Patrick: [00:20:36] Absolutely. And, in fact, the latest version of Gmail will recommend replies. So, you hit reply, and it will actually pre-fill a suggested reply to that email.

Peter Margaritis: [00:20:50] Interesting. I know a lot of businesses are using G Suite. And I'm just learning about G Suite, and trying to figure out how that's going to help me in the business. How does G Suite help a business in managing their contacts, and their email, and all things assorted to that business?

Byron Patrick: [00:21:12] Well, you know, G Suite is just kind of an alternative to the Microsoft platform. And the beauty is that Google innovated what was a very stale platform. Microsoft Office, Outlook e-mail was all very boring and very mundane. And Google, you know, kind of has taken it to the next level, introducing machine learning, and artificial intelligence, and all types of the add-ins for, you know, like Grammarly, and Boomerang, and these types of things.

Byron Patrick: [00:21:45] Microsoft has, now, been forced to step up their game. So, Microsoft Office 365, now, has a lot of those features and functionality that G Suite provides. And they're working to go even beyond. They have entire Cortana Cloud, which is their artificial intelligence virtual assistant that they are now putting on top of Office 365 to give you all of those benefits, staying inside that Microsoft platform.

Peter Margaritis: [00:22:18] Oh my god, my head's full because I run on a Mac, but I've got Windows also on the Mac, and I run 365, and trying to -- I've just kept my 365 for Word and Excel, and that's about the extent of it. But then, I get these e-mails from Microsoft, and I'm reading them, I'm going, "This is cool. I just don't understand it."

Peter Margaritis: [00:22:43] And I got frustrated one day and made a comment to my son, who's now 18, and his reply back to me was, "Dad, if you don't understand, just google it. The answer is out there." You know what, go away. You know, nobody likes a smart aleck. But he's right.

Peter Margaritis: [00:22:59] And I think of my generation, the Baby Boomers, that's not the first thing that pops into our head. It's, you know, "Go find it. I need some help," versus "I can get the help. I just got to google it, and ask a bot, and receive that information." And that's pretty cool.

Byron Patrick: [00:23:19] You know, and you nailed it. I will never forget when -- I have daughters. They were probably, you know, five and seven. And we're unpacking Christmas decorations, and one of the decorations is a snow globe, Coca-Cola snow globe that had polar bears. And, you know, one of my daughters turned to me and said,

"What in the world does a polar bear have to do with Coca-Cola?" and you know. So, I was like "I don't know. Let's find out." So, we get on the Google and do some research. And, you know, we find an article in the Library of Congress that, basically, talks about the entire origin of the polar bear marketing campaign from Coca Cola.

Peter Margaritis: [00:24:08] Yeah.

Byron Patrick: [00:24:09] Yeah. And so, like, I do all of this, and then I can sit back, and think about it. Actually, you know what, when I was their age, I never would have thought to ask that question because there's no way in hell I ever would have gotten the answer to it.

Peter Margaritis: [00:24:25] Right.

Byron Patrick: [00:24:26] But they know they've got the world at their fingertips. So, why not.

Peter Margaritis: [00:24:33] That's interesting, but yeah. I mean, that's what they've grown up with. They didn't grow up with the Encyclopedia Britannica that sits on a shelf in your house, or, you know, I can't tell you the last time I looked in an encyclopedia. My friends never looked in an encyclopedia. And it really is at our fingertips.

Byron Patrick: [00:24:53] Yeah.

Peter Margaritis: [00:24:54] So, what are the other hot topics that you're speaking about an ENGAGE?

Byron Patrick: [00:24:59] Well, managing your business in the cloud. It is huge. So, for many years, we've been stuck installing Quickbooks, and Microsoft Office, and all these apps to our local computers, dealing with like a Windows parallel along our Mac to try to work in there. And the future, which is happening as we speak, is the world of browser-based applications. And organizations are now adopting all of these browser-based applications. They're adding multiple logins to all their staff. They've got

data all over the place. And talking about how to gain control of that browser-based computing platform for your business, and how to do it efficiently, effectively, and securely.

Peter Margaritis: [00:25:52] Browser-based applications, and you're saying something about parallels, and Microsoft, Mac on a browser-based application, which-

Byron Patrick: [00:26:04] Well, in the world of browser-based applications, you will eventually be able to throw away parallels, throw away running Windows on your Mac because everything will just run in your browser. You will have access to -- I mean, even your office 365, you can access all of that within your browser. And I'll tell you, you have the large majority of functionality that you have today with the locally installed Microsoft.

Peter Margaritis: [00:26:36] Wow, because I'd never -- So, I can log into Microsoft under my password and pull it up on a browser?

Byron Patrick: [00:26:45] Absolutely.

Peter Margaritis: [00:26:46] Without having to go through parallels?

Byron Patrick: [00:26:48] That's right.

Peter Margaritis: [00:26:49] And I guess I could have done that initially without even going through parallels. It's just sign up with Microsoft. So, I don't really have to have Windows on my-

Byron Patrick: [00:27:01] That is right. The decision of the operating system is becoming irrelevant.

Peter Margaritis: [00:27:06] Wow, wow. And I can just see the benefits to that for businesses.

Byron Patrick: [00:27:14] Absolutely.

Peter Margaritis: [00:27:15] Because they always say, you know, Microsoft is the analytical aspect of the computer, and the Mac has always been the creative side. Now, basically, instead of being predominately one side of that right or left brain, you can have both sides together. And, man, that's going to unleash a lot of opportunity.

Byron Patrick: [00:27:31] Absolutely. You can put your peanut butter with your jelly.

Peter Margaritis: [00:27:36] And put a banana with it there.

Byron Patrick: [00:27:40] There you go.

Peter Margaritis: [00:27:40] Oh man. So, we're rapidly moving, transforming our businesses. Technology is becoming a lot smarter, a lot more helpful. But I feel like that we're still working twice as hard.

Byron Patrick: [00:27:55] All this code for efficiency is really just squeezing more out of you.

Peter Margaritis: [00:28:01] I have a feeling that that's true because it just seems like we keep adding another layer, another layer, but it does make the work easier to accomplish. And I think it allows us to take on more work, and we try to multitask, but that's a whole other issue. What were some of the questions that people asking you during your sessions?

Byron Patrick: [00:28:20] Well, I mean, one of the big topics is password management. You know, we've been talking about it forever.

Peter Margaritis: [00:28:28] Oh god.

Byron Patrick: [00:28:29] Right? So, a lot of conversation of, "You know, well, is this okay? What if I, you know, write it down in a hieroglyphics?" you know. So, there's always a lot of questions about that. That's big discussion. And then, a lot of discussion

on the decision of what apps to begin using. There's so much innovation going on. And this fear of better options in the sense of, you know, "I've signed up for this application. I'm now using it to, you know, process all of our expense reporting. And now, there's a new one that does that, plus," you know. It's like, at some point, you have to pull the trigger and say, "I'm married to this cause." So, there's a lot of decisions. People are having a hard time with that decision.

Peter Margaritis: [00:29:27] And this, the platform I'm using right now, Zoom, has I think taken over what Skype had built at one point in time because the other person doesn't have to have an account. And the video aspect of it is a lot cleaner and nicer than Skype's was, and it's very user-friendly.

Byron Patrick: [00:29:48] Yes.

Peter Margaritis: [00:29:49] Because we're having this conversation, you're in Maryland, I'm in Ohio, and I can even see this being brought -- Because we use Adobe Connect. I could facilitate an eight-hour session for the Washington Society of CPAs in Bellevue, Washington. Of course, they had enough participants, but not enough to cover the expenses of bringing me out there. So, I held a class, and I could see them, they could interact with me. And that's, I think, part of where learning is going to go as I'm still having the interactions. It's better than webinars. It's one sided. It creates that conversation. So, what's your favorite app?

Byron Patrick: [00:30:29] My favorite app. I tell you. So, about a year ago, I would have said Evernote.

Peter Margaritis: [00:30:35] Evernote.

Byron Patrick: [00:30:35] I'm a huge, huge Evernote fan.

Peter Margaritis: [00:30:35] Yeah, me too.

Byron Patrick: [00:30:35] And you know what, Microsoft -- So, I was a OneNote fan for years, and that just got boring, and very plain. So, then, I went to Evernote, fell in love with Evernote. And, now, I'm back to OneNote because I have a touchscreen and a stylus. I love to write on my screen. And in OneNote, I can write my notes in there and keep it all organized. And if I get really crazy, it'll convert that to type text. So, yeah, I'm really crushing on Office 365 just because of everything they do in there.

Peter Margaritis: [00:31:17] I do agree with that. Chris Jenkins, who's the South Carolina CEO of the CPA Association, he was a big Mac guy. And when he was here in Ohio, he took his job at South Carolina. And somebody goes, "Well, what's that?" He goes, "That's a Surface Pro." "What?" He goes, "Pete, 365 has blown away a lot of stuff that Apple was doing at the time."

Peter Margaritis: [00:31:42] And what sold me was the fact of he showed us how when you're developing a presentation, however you do it, but you can go into Word, and you could use the outline feature in Word, lay it out as an outline form, save it that way, go and open PowerPoint, and PowerPoint will bring your outline, and populate your slides, and you can start developing your slide deck at that point in time.

Byron Patrick: [00:32:12] Yup.

Peter Margaritis: [00:32:12] Which I went, "Holy cow, that was a winner winner chicken dinner." I've told a lot of people about that. Obviously, you've got to smile. You're going, "You know about that?" They go, "Really, you can do that?" I'm like, "Yeah. It does save time." Yeah, it doesn't save time if it's already developed. Yeah. So, 365 is very powerful. I didn't know about OneNote. So, I need to look into that because I love Evernote.

Peter Margaritis: [00:32:37] And I tell you what, I'm amazed how many people don't have some type of note taking app on their devices because at these conferences, you know, we're talking about stories, and developing stories, and they're out there everywhere, and you can't commit it to memory because you'll forget about it, but all I got to do is take out your phone app, Evernote or whatever, just write a few words

down, so you can come back and revisit. I go, "How many of you use Evernote?" And they're looking like, "What's that? I don't know." I'm like I can't. If an app ever crashed on me, I would lose so much information because that's my primary note taking.

Byron Patrick: [00:33:16] Yeah.

Peter Margaritis: [00:33:17] Now, sometimes, I don't use it when a speaker is talking because I don't want them to think that I'm texting, or playing Angry Birds, or something. But, at times, prior to, I've said, "You're going to see me on my tablet here. I'm just taking notes. I'm not doing anything else. I promise you that," because I know how sensitive that can be that, as a speaker, and when you see folks on their phone or on their tablet, it kind of throws off a little bit because, in your mind, for just a brief second, you go, "I wonder what the hell they're really doing."

Byron Patrick: [00:33:48] Right. And that's one of the reasons why I moved to the stylus with my touchscreen. I have a Lenovo Yoga, which I can slip back like a tablet. And now, I can just hand write. And that way, there's no question. I'm not doing Candy Crush. I'm actually taking notes.

Peter Margaritis: [00:34:06] But I've tried writing on my iPad, or some of these note taking. My handwriting is bad enough, but it gets a thousand percent worse when I do that. And the styluses, I don't know if it's because of my hand position and it's on that. And I've never been able to master that. And I'd love to be able to.

Byron Patrick: [00:34:28] Yeah. Next time we see each other, I have to give you a little demo on my Yoga because I tell you, I had the same challenge, but I feel like it is so darn close to actually being pen and paper. It does a nice job.

Peter Margaritis: [00:34:44] Wow. Yeah, I do need an update or a class on that, some instruction from the master. So, what app would you suggest or what apps would you suggest CPAs have, the must-have apps for their business, whether in public, or an industry, or government, or education?

Byron Patrick: [00:35:06] Oh man. Well, it's such a large span of apps that are out there. I mean, obviously, some form of online accounting, I think, you know, is definitely where you need to be. I mean, begrudgingly, Quickbooks online is really common around to be a solid product that, you know, a lot of people are using, and there's just so many integrations in the marketplace that are out there that it just gets the job done really well.

Byron Patrick: [00:35:43] You know, after that, I mean -- Gosh, you're putting me on the spot here. I mean, Zoom is, in my humble opinion, wonderful, especially for a remote workforce. Our business, we have employees in West Virginia, in Western Virginia. I'm sitting here in Maryland. And to be able to jump on a Zoom and have a face-to-face conversation with staff is just a real game changer, for managing staff meeting with potential clients. I can't say enough about that.

Byron Patrick: [00:36:20] And then, you know, one of my favorites is CamScanner. It's this little app for your phone that allows you to take pictures of paper and convert it to PDF. And, in fact, actually, now that I say that, I'm going to take it back because Office 365 now has an app called Office Lens that is far superior for taking pictures of whiteboards, pieces of paper, and all the such, and turning it into a PDF, or JPEG, or whatever you need it for.

Peter Margaritis: [00:36:54] Wow, that's cool. I'm going to have to be able to check that out. But you said something about Zoom, which takes me to another huge benefit of using Zoom. You can have a conference call on Zoom. You can see the individual, but whoever's running it can mute everybody.

Byron Patrick: [00:37:13] Such an underutilized feature.

Peter Margaritis: [00:37:17] It is.

Byron Patrick: [00:37:17] Absolutely.

Peter Margaritis: [00:37:17] It is. And they can control the person's microphone at anytime. And I told you, I'm the new president of NSA Ohio, and our conference calls are going to be -- our board meetings are going to be conducted on Zoom. And I have the controls, and they'll know. I'm going to say, "We're going to do this in some kind of order," because when you get a bunch of speakers together, and on a board, you can't get a word in edgewise, and it tends to go on for too long of a time. With Zoom, you know, you can control that. You can control people stepping over each other. And that's another reason why I love Zoom.

Peter Margaritis: [00:38:01] And like I told you, I take my iPad to our chapter meetings. We just started this last year. And we're Zooming our chapter meetings out to our membership and others who want to participate, if there's a reason they can't make it to the meeting that day. You know, we're not trying to get people to stay home. We want people to come. We still want that aspect, but it's when you can't, something's come up, you need to be home, you can still participate and still get that information.

Byron Patrick: [00:38:34] Yeah. Yup, absolutely.

Peter Margaritis: [00:38:36] Yeah, I love it. And, you know, I guess, I didn't realize I could use it on an app. See, baby boomer mentality. I just thought I had to use it on my laptop or my desktop. The first couple meetings, we were Zooming off of a laptop until someone said, "You know there's an app for that." And, technically, I could Zoom the meeting off my cell phone.

Byron Patrick: [00:39:01] Yup.

Peter Margaritis: [00:39:02] Yeah. Yeah. That's -- Yeah.

Byron Patrick: [00:39:03] Yeah. I do that on a regular basis. If I'm out and about and need to attend a meeting with staff, I just fire it up on the phone.

Peter Margaritis: [00:39:14] Cool. And I can only imagine what it's going to look like five years from now.

Byron Patrick: [00:39:21] Yeah. Wait for the 3D hologram of Peter Margaritis that's running next to me.

Peter Margaritis: [00:39:28] Oh man, that would be scary enough to get a hologram on the show at any time. I think, folks like yourself and your business are so critical to CPAs these days because of the complexity of what goes on from an IT internet world versus, you know -- And we've got enough as it is just trying to figure out, you know, the regulations and compliance that we need. You and your company, and your company is Network Alliance, are critical to the success of the profession in a lot of ways.

Byron Patrick: [00:40:11] Hey, I really appreciate that. I mean, it is a ever-changing world. And, you know, we're trying to pivot and stay up to date to make sure that we can keep bringing that value to, you know, the industry and keep everybody relevant.

Peter Margaritis: [00:40:31] Yeah, and I can imagine. As I think well, you know, CPAs, we're always trying to stay current, and especially when the new tax law comes out, everybody would want to get up to date with it. But in your world, everything is getting updated almost on a daily basis to some degree. I don't know how you keep up with everything that's happening.

Byron Patrick: [00:40:50] I don't feel like I do. You know, I wonder what I'm missing.

Peter Margaritis: [00:40:58] Yeah. And you're probably not missing anything. It's just the amount of volume that's coming out, but I would rest assure that anything big and major, you're all over it. Well, let me figure it out this way, anybody can do five sessions at ENGAGE, and one to be asked to do five, and then to do that, you've got a breadth and depth of knowledge associated with this subject. You've got the name and the profession. You're recognized that the AICPA level. You'll have it covered. You got it covered. You got it covered, my friend.

Byron Patrick: [00:41:32] I'm glad we disabled the video because I'm cherry red, blushing red now. I appreciate those kind words.

Peter Margaritis: [00:41:40] You're more than welcome. You know, in the show notes, we'll put your information, how people can contact. How can people contact you?

Byron Patrick: [00:41:49] There's a number of ways. I mean, obviously, the Twitter, the LinkedIn are great ways to get a hold of me. In fact, I just recently connected with a firm in Alaska via Twitter, which is kind of fun. And, you know, obviously, good old email, BPatrick@NetworkAlliance.com. I would love to hear from you there. And if you so desire to pick up a phone, and you're above the age of 35, you can, you know, call me at 703-715-4948.

Peter Margaritis: [00:42:26] I hope your phone blows up now that you gave everybody your phone number. That is great. Well, I greatly appreciate you taking time. I always enjoy our conversations. The problem that we have is we live too far apart. Hopefully, our paths cross sooner than later.

Byron Patrick: [00:42:49] Absolutely.

Peter Margaritis: [00:42:49] And I look forward to future conversations.

Byron Patrick: [00:42:54] Thanks, Peter. I definitely look forward to it. And speaking of looking forward to, I cannot wait to get my hands on that new book of yours.

Peter Margaritis: [00:43:02] Oh, thank you very much for the plug. Yes, by the time this goes out, the new book will be live on Amazon. And the name of it is Taking the Numb Out of Numbers. I appreciate your call out. Yes, you'll be receiving a signed copy from me.

Byron Patrick: [00:43:18] Can't wait to put it on my shelf.

Peter Margaritis: [00:43:21] Thanks, man.

Byron Patrick: [00:43:21] Thank you.

Peter Margaritis: [00:43:23] I want to thank Byron for filling our heads with a lot of IT information that, hopefully, we will be able to apply in our businesses. Thank you, Byron.

Peter Margaritis: [00:43:33] In Episode 10, my guest is Rebecca Brown, who's the Development Director at the Maryland Association of CPAs. Thank you for listening, and begin the process of Changing your Mindset and getting out of your comfort zone, and develop new skill sets to become more future-ready. Your call to action is to ask yourself if you can do more to have a greater impact on your career and in your community. Remember, a part of being future-ready is being an improviser. So, yes, and - I'm out.