



## SaaS in the Tax and Accounting Profession: Is a Software Leasing Model Right for My Firm?

How to Put SaaS (Cloud Computing) to Work in Your Firm

# Polling Question

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Describe the level of SaaS participation for your firm:

- We are currently using SaaS delivery in our firm.
- We are strongly considering moving to SaaS computing within the next year.
- We are starting to look into SaaS computing.
- We're just trying to learn more about it.
- We are not interested in SaaS computing.
- Does not apply to me.

# Agenda

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- What is SaaS?
- Why is SaaS hot today?
- What does SaaS bring to the profession?
- What are the benefits & advantages of SaaS?
- What else should I take into consideration?
- What should I ask my vendor?
- Where do I go from here?



# What is SaaS (Software as a Service)?

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- The Tax and Accounting business at Thomson Reuters defines SaaS as:

*A complete software solution that is accessed via the web and dynamically allocates resources to meet the needs of the end-user. At the same time, SaaS provides secure, anytime, anywhere access, high-level security and data privacy via a top-tier data center. SaaS is typically priced according to an affordable and flexible monthly leasing model.*

# Why Is SaaS Hot Today?

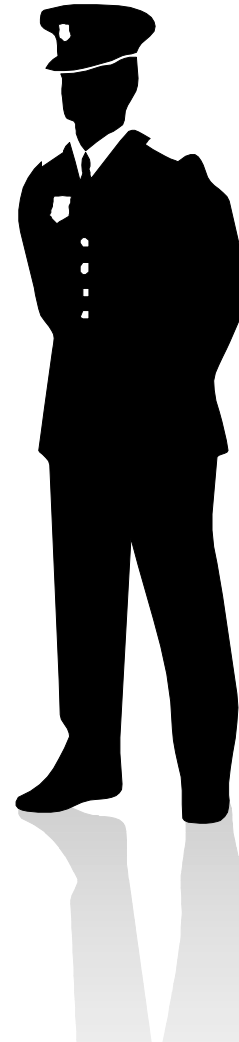
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- Attractive, **cost-efficient pricing** models, limited up-front costs
- Reliability of Internet **access**
- Advanced and dependable **security and privacy**
- **Web-hosted** environment that allows firms to focus on business, rather than IT management

# SaaS Meets the Needs of the Tax and Accounting Profession

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- Superior **security & privacy** features
- Remote access provides:
  - Staff retention with **work/life balance solutions**
  - **Non-traditional options** for “busy season” staffing
- Allows you to tap into industry-specific expertise in different locations
- Supports mobile users in the field



# Advantages of the SaaS Model

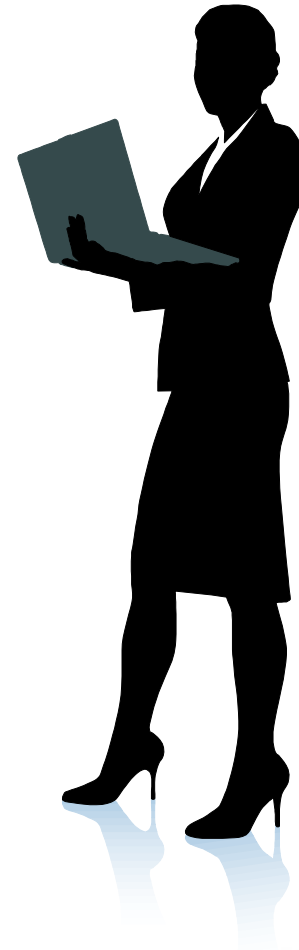
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- Low start-up **costs**
- Anytime, anywhere **access**
- Reliable and automatic **backup systems**
- Automatic **updates & version control**
- Significantly **reduced IT infrastructure**
- High-level **security**
- Ensured **business continuation**

# Other Considerations

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- Internet connectivity & bandwidth concerns
- Integration with locally installed applications
- Vendor experience and history



# Process Efficiencies & Increased Client Satisfaction

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- Reduced IT demands = **More time to service clients**
- 24/7 anytime/anywhere software access = **Flexibility**
  - Staffing part-time/remote employees
  - Software access from client's office
  - Software access from home
- Integrated software = **Improved staff efficiency**
- Automatic backup = **Significant time savings**
- Integrated client applications = **Improved client service & progressive image**

# Ask Your Vendor

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- How long have you been delivering applications in a SaaS environment?
- Can I use your SaaS solution with limited up-front costs and a regular monthly fee?
- If I discontinue your SaaS offering, how do I access my firm's data?
- What infrastructure is in place to ensure access to my firm's software and data when needed?
- What security provisions are in place for the data and products provided?

# Where Do I Go from Here?

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- **Learn** as much as possible about SaaS and solutions available in the market.
- **Evaluate** your firm's current software and hardware environment.
- **Investigate** local Internet service and reliability.
- **Question** vendors on their SaaS solutions.

# Thomson Reuters Solutions

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- Tax
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# Thomson Reuters SaaS Solutions

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Write-Up CS®

Microsoft® Office® w/Exchange

Engagement CS®

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