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OF TECHNOLOGY & PUBLIC ACCOUNTING



# Looking for a strategic consultant?

**Gregory L. LaFollette**, CPA.CITP and Executive Editor of *The CPA Technology Advisor*, is a nationally recognized speaker on subjects that address the use of technology to support a better business process with the goal of building a better accounting practice.

Greg is uniquely qualified to help vendors understand and communicate with the various segments of our profession. In past lives he practiced for over 25 years in the large, local firm he founded in South Dakota and spent over five years as VP of Product Strategy for Thomson Creative Solutions. He left that position in 2003 to "reclaim my independence" and take editorial and strategic responsibility for *The CPA Technology Advisor*. His role with the magazine provides him enhanced access to the executive leadership of all of the major software vendors while his consultancy role provides him the opportunity to be in literally hundreds of practices.

Greg is also very active in the profession, chairing the prestigious AICPA CITP Credential Committee, and serving on its Top Technology Initiatives Taskforce and its TECH+ Conference Planning Committee. He also consults ad hoc with many state society Technology Conference planning committees. Finally, to "sharpen the saw," Greg offices with Eide Bailly, LLP (a Top 30 firm) where he serves as Senior Manager of Tax and Technology Consulting.

## Marketing to the Public Accounting Profession – 101

### A Special Day of Consulting for your entire team!

Whether your company is large or small, with a single offering or multiple products, well-established or just entering the marketplace, you can benefit from Greg's extensive background. As both an industry and professional thoughtleader, he can help you refine product features, establish target market segments, and, most importantly, enhance your understanding of demographics of the accounting profession and "the mind of the practicing accountant." He regularly speaks to (and with) thousands of

practitioners and consults with dozens of vendors serving the profession. No one else offers this deep, rich and complete background. Greg is available for strategic planning/product review upon request – learn what your customers want, what they need (not always the same thing!), and what your competitors know and don't want you to find out!

**Travel expenses and a daily consulting fee apply.**

#### *A note from Greg*

- ▶ I accept only a limited number of vendors as consulting clients.
- ▶ I travel and speak extensively, and my calendar fills very quickly.
- ▶ My consultations are done on-site and only in a full (or multi) day format.
- ▶ Full days generally include a dinner meeting the day I arrive and a complete "long-day" session with ending times usually based on my return flight schedule.
- ▶ I implement a mutual NDA with each and every client.
- ▶ My consultations do not include written reports.
- ▶ I offer a "no question" guarantee – if our time together was not as valuable as you had expected simply so note on my invoice and pay only my expenses.
- ▶ My daily rate is industry average.
- ▶ I do not bill for follow-up telephone calls or emails.
- ▶ I spend your travel dollars as though they were my own and always try to group trips so as to minimize costs for everyone.

#### A partial list of Greg's recent on-site vendor visits:

Acct1st — Dallas, TX  
AccountantsWorld — Hauppauge, NY  
ADP — Parsippany, NJ  
AICPA — New York, NY  
ATX — Rockville, ME  
BankServ — San Francisco, CA  
Bill.com — Palo Alto, CA  
BNA Software — Washington, DC  
BQE Software — Torrance, CA  
CCH Tax & Accounting — Riverwoods, IL  
CFS Tax Tools — Simi Valley, CA  
Copanion — Andover, MA  
CPA ServiceGroup — Ft. Worth, TX  
Drake Software — Franklin, NC  
Dun and Bradstreet — Short Hills, NJ  
Fujitsu of America — San Jose, CA  
Hewlett-Packard — Palo Alto, CA  
Illum Software — Ann Arbor, MI  
Intercept Software — Fargo, ND  
Intuit — Mt. View, CA  
Lacerte (Intuit) — Plano, TX  
LexisNexis Time Matters — Raleigh, NC  
Lightbulb Technologies — Houston, TX  
Microsoft — Redmond, WA  
Microsoft Great Plains — Fargo, ND  
Mirra, Inc. — San Jose, CA  
NetBooks — Rohnert Park, CA  
NovaStor — Simi Valley, CA  
NSA — Alexandria, VA  
OrangeDoor Software — San Bruno, CA  
ParishSoft — Ann Arbor, MI  
PayCycle — Palo Alto, CA  
RealTimeBookkeeping — San Diego, CA  
RIA — Carrollton, TX  
Sage CPASoftware — Pensacola, FL  
Sage Software — Raleigh, NC  
The Sleeter Group — Pleasanton, CA  
Thomson Creative Solutions — Dexter, MI  
Thomson GoSystem Tax RS — Carrollton, TX  
Thomson PPC — Fort Worth, TX  
Thomson Tax & Accounting — New York, NY  
UTS Taxwise — Rome, GA  
VerticalLend — Melville, NY

**"We were recently honored by receiving a K2 Quality Award for 'Corporate Strategy.' Needless to say, Greg has been a big part in defining Acct1st's strategy and tactics for the past two years, and he certainly deserves a big part of the accolade! We appreciate all you do for us."**

James C. Beach, CPA.CITP  
Bright and Bright, LLP & Acct1st

**"I am one of your biggest fans. My feeling is that the world makes a lot of jokes about consultants coming in and looking at your watch and just telling you what time it is without adding a lot of value. You add real and enduring value. I genuinely believe that you behave much more as a business partner than a consultant. We would recommend you to anyone without reservation."**

David Kvederis,  
President & CEO of BankServ



GREGORY L. LAFOLLETTE, CPA.CITP

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