



TOOLKIT

From Fragmented Tech to a Unified Stack

5 Steps to Organize Your Accounting Firm's Apps, Software, & Technology



01

TAKE INVENTORY

Audit Your Current Technology

Document everything in your tech ecosystem.

CHECKLIST

- Hardware: Servers, workstations, network equipment
- Software: All accounting, tax, and productivity tools
- Licenses: Current versions and compliance status
- Network: Connectivity, bandwidth, and security setup



Download the Firm Process Optimization Inventory worksheet to guide your audit process.

02

SORT & PRIORITIZE

Identify What Stays and What Goes

Ask yourself:

“Does this tool directly support our primary services (tax, audit, or advisory)?”

✓ KEEP

Critical Tools

- Core accounting/tax software
- Client-facing platforms
- Security essentials
- Integrated workflows

✗ ELIMINATE

Redundant Tools

- Duplicate applications
- Outdated versions
- Unused licenses
- Incompatible systems

05

CREATE THE RULES

Build Your Standardization Framework

Four pillars to govern your unified technology stack:

1

Tool Standards

Define approved technology stack
Everyone uses the same tools

2

Security Policies

Implement enterprise protocols
Protect client data consistently

3

Vendor Requirements

Set partner criteria
Choose reliable providers

4

Data Governance

Establish management rules
Control access and retention

✓ Now you're ready to unify your tech stack

You're on your way to a more efficient, secure, cost-effective firm. Share your insights across your team to start turning your technology into a unified platform.

