

# Special Report

Leveraging Your Tech Stack



## A better toolkit

A more effective tech stack starts  
with your accounting firm's strategy

# A better toolkit

A more effective tech stack starts with your firm's strategy

By Antoinette Alexander

**F**irms looking to remain competitive in today's environment are approaching technology not just as a collection of tools but as an essential part of their operating model. They are strategically designing, integrating, and leveraging their tech stack to better support higher-value services, enhanced client experiences, and scalable growth. Is your firm among them?

"Technology decisions should not be an afterthought. Technology decisions are leadership decisions and should be treated as part of your service-delivery strategy. They reflect a firm's values of consistency, accountability, and long-term thinking," said Zane Stevens, director and founder of Protea Financial, a client advisory services firm in Novato, California. "Firms that treat tech as a strategic asset, not a necessary expense, will be far better positioned to scale, specialize, and deliver meaningful value to clients. You do not need to be on the leading edge of technological changes, but you should be proactive to remain relevant in a changing market."

Joshua Chapel, founder of Mana Accounting and Advisory in Bethlehem, Pennsylvania, agreed and said, "Technology in accounting is expanding quickly, and it can feel like a big task to keep up. But these are some of the most important decisions firms can make today because they shape how you operate, scale, and serve clients. I'd encourage firms to regularly review what they use, stay aware of

what's emerging, and make intentional, calculated choices based on the kind of firm they want to build."

*Accounting Today's* annual Year Ahead survey, which explores firms' expectations for 2026, found that staying current with technology and managing the impacts of artificial intelligence are top concerns. More specifically, 45% of small firms (those with less than \$200,000 in annual revenue) identified keeping up with technology as a major challenge for 2026. Midsized firms highlighted the effects of AI (34%) and staying current with technology (23%). Similarly, large firms emphasized the impacts of AI (41%) and staying up to date with technology (30%).

Which technologies will change the way firms work most in 2026? According to the survey:

- Generative AI (51%);
- The cloud (28%);
- Agentic AI (25%);
- Non-AI automation (21%);
- Collaboration tools (21%); and,
- Industry or vertical solutions (15%).

## Choosing tech with intent

Firms that buy tech tools just to have the "latest and greatest" or address immediate issues, like staffing challenges, client demands, or manual tasks, should first assess how each solution aligns with their overall strategy and client needs. Failing to do so can lead to poor integration and technology that is simply a quick fix for past problems.

"Alignment is critical. A firm's tech

## SPOTLIGHT ON

### Digits



Jeff Seibert  
Founder and CEO

#### How should firms think differently about the tech they use?

In 2026, accountants shouldn't judge technology by time saved, but by which work is on the path to disappearing. AI-native software isn't just accelerating the close — it's beginning to execute it. "Always-current books" are no longer just a slogan; they're becoming achievable. As software moves toward producing the output, human value shifts to judgment: identifying risk, explaining what matters, and advising before clients ask.

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stack really should directly reflect the strategy of the firm,” said Kim Blascoe, senior director for CAS professional services at CPA.com. “So you think about client mix, target industries, advisory ambitions, your pricing model, your growth plans. Without alignment, your technology becomes more of a constraint, rather than an enabler. And I think one of the things when you’re thinking about what questions should we be asking is: Who are we serving? What services are we prioritizing now and in the future? What outcomes do we expect the technology to enable?”

Echoing the sentiment, Arna Erazo, advisory partner and CAAS practice leader at GHJ in Los Angeles, said, “The most important criteria are strategic alignment, scalability and integration. Technology should support where the firm is going — its growth goals, service model, and client experience — not just solve an immediate operational frustration. What firms most often get wrong is starting with the tool instead of the strategy. It’s easy to get excited about new features or industry buzz, but without a clear long-term vision, firms end up with disconnected systems that create more complexity than value.”

Marcus Dillon, owner of Katy, Texas-based Dillon Business Advisors, agrees that alignment “is critical” and said that firms focused, for instance, on providing recurring advisory services will require different tech tools than a firm focused on seasonal compliance work.

To help firms ensure alignment, Dillon outlined several questions they should ask themselves first, including:

- What services do we provide?
- What outcomes do clients expect from those services?
- Does the tech tool help serve more clients with the same team?
- Does it decrease review time, rework, or client follow-up?

- Does it ensure smooth handoffs across roles?
- Where does the tool fit within our straightforward, documented workflow?
- Who touches it?
- Does the technology match the clients’ level of sophistication and involvement?
- Will it create more friction or more clarity for clients?
- Does it reduce or add steps?

Advised Dillon, “Every firm should have a simple, documented workflow before evaluating new technology. This matters because tech tools without a clear step in the workflow create chaos. Aligned tech tools support and reinforce your operating system.”

Added Jason Edwards, senior manager at Princeton, N.J.-based Top 100 Firm Withum, “I think the first question you have to answer is: Is this going to be a good fit for our clients? Is this going to help them achieve their goals? Is this going to make their lives easier? A secondary to that is: Is it going to make our lives easier? If we’re the ones that are pushing the buttons, if you will, and entering the transactions and doing the reconciliations, are we going to be able to do it efficiently enough to service that client and all of our other clients well?”

Robust integration is also essential for a well-structured tech stack. Without strong integration, data becomes siloed, work gets duplicated, and the likelihood of errors goes up. Additionally, a tightly integrated platform enables firms to harness data and deliver in-depth insights.

Simon Williams, vice president of the accountant segment at Intuit, cautioned against over-indexing on point solutions or individual features, and said, “A well-designed, integrated tech stack functions as a single, end-to-end platform, allowing data to flow

## SPOTLIGHT ON

### Rightworks



**Roman Kepczyk**  
Director of firm  
technology  
strategy

#### How should firms think differently about the tech they use?

Accountants must recognize that the pace of technological advancement in automating production is accelerating, and prioritization is key to remaining competitive. This starts with viewing technology as a strategic advantage, not a cost center. The right infrastructure can dramatically improve team effectiveness, client service, turnaround times, remote work, and security that protects your firm's reputation. The impact on growth rates, talent attraction, and the ability to scale without proportional hiring ultimately makes firms more capable, resilient, and profitable over time.

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seamlessly between systems, reducing manual entry, minimizing errors, and providing real-time insights that drive faster decision-making and growth. In contrast, a collection of point solutions often creates data silos, where information is trapped in disparate tools, leading to inefficiencies and frustration for staff as they aren't able to easily find the most impactful signals through the noise."

Continued Williams, "Operationally, integration matters because it directly impacts employee productivity and client experience. When financial software integrates across all aspects of accounting, from bookkeeping, payroll, payments, client communication tools, and more, it eliminates redundant work and ensures everyone is working with the same accurate data, freeing teams to focus on higher-value work and client outcomes."

When asked about the importance of integration, Kirat Sekhon, head of engineering, accounting, tax, practice and audit at Thomson Reuters, said, "A well-designed stack is built around the firm's workflow and connects systems so data moves seamlessly across the life cycle of the work. It can still include multiple best-in-class tools, because different problems often require different solutions. But the difference is flexibility and connectivity: strong integrations, accessible data, and vendors that commit to open ecosystems. Operationally, this matters because integration drives consistency, reduces rework, improves visibility, and lowers the manual effort of moving information between systems."

### Implementation to impact

Selecting and implementing technology is only the start. Real impact occurs when it changes how firms work and serve clients. "Firms need to be willing to reimagine the workflow, not just

replicate old steps in a new tool. That means establishing clear KPIs tied to outcomes (time saved, cycle time, error rates, realization, turnaround time), and revisiting those KPIs regularly to confirm the technology is delivering the intended impact," Sekhon said.

Underscoring the point, Jeff Seibert, founder and CEO of AI-native accounting platform Digits, said, "ROI fails when firms automate broken processes or treat implementation as the finish line."

"Technology delivers returns only when workflows are redesigned around it. Firms can mitigate risk by piloting with real client work, setting clear outcome metrics, and holding both vendors and internal teams accountable for behavior change, not just adoption," he said.

Erazo of GHJ added, "Technology implementation should always be paired with process redesign. Firms need to map existing workflows, remove unnecessary steps, and standardize how work is performed so the technology can actually do what it's designed to do. It's also important to track performance metrics such as turnaround times, error rates, and cycle times. Measuring results helps confirm whether the changes are working and where further refinement is needed."

At GHJ, the focus has been on "building an integrated, cloud-based environment that supports automation, collaboration, and real-time visibility," Erazo said. "That includes workflow management tools, data capture and automation solutions, and reporting platforms that allow us to deliver more timely, insight-driven services. These investments have helped us scale our outsourced accounting and advisory offerings, serve clients across a range of industries, and shift our teams' focus from transactional processing to analysis and strategic support."

## SPOTLIGHT ON

### Wolters Kluwer



**Adam Orentlicher**  
Senior vice  
president and chief  
technology officer

#### How should firms think differently about the tech they use?

Firms need to shift from "AI answers my question" to "AI powers the workflow." Point solutions create handoffs; orchestrated agents eliminate them. Start with one repeatable process ... say, tax return intake ... define a success metric, then connect extraction, review, routing, and delivery end-to-end. Build in governance from day one: audit trails, confidence signals, expert override at key decision points. When your tech stack orchestrates rather than automates in isolation, gains compound across the entire firm.

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Protea Financial serves wineries and wine-related businesses. Having a strong understanding of the industry it supports helps guide the firm's technology decisions. Stevens said the firm has built its core technology stack around practice management, cloud accounting platforms, industry-specific tools for wineries, and standardized reporting and workflow systems.

"We have intentionally invested in tools that support inventory-heavy, cost-sensitive businesses. Understanding the industry we serve and where they see value informs our decision-making around technology. It is an industry that has traditionally been slower to adopt new technology, and this has to be factored into our decision-making process," said Stevens. "We've paired technology decisions with clear role ownership, such as technology leads and quality leads, and ongoing training. This has allowed us to scale consistently, maintain quality, and deepen our industry expertise without adding unnecessary complexity."

Chapel of Mana Accounting, which aims to help growing startups, professional services firms, and law firms with scalable financial operations support, said that the firm's tech stack "was built around our core goal of delivering accurate, decision-ready reporting to clients."

"We focus on tools that make it easier to do that efficiently across our service areas while maintaining consistency and quality," he said. "Steps we've taken include consolidating apps so we have a single source of truth for key data, moving toward tools that provide increased efficiency and out-of-the-box reporting, and leveraging AI where we can to create more time and deliver more value to clients."

Meanwhile, Aprio, a Top 100 Firm based in Atlanta, is investing \$300

million over five years to build an integrated AI and automation ecosystem designed to transform how professional services are performed, support current service offerings, and enable expansion into new advisory areas, explained chief technology officer Brent McDaniel. "Our technology strategy is not about adding isolated tools; it is about creating a connected environment where data, workflows, and insights flow seamlessly across the firm," he said. "Key components of this ecosystem include workflow automation that reduces manual handoffs, intelligent document processing that extracts and organizes information from diverse client sources, firmwide knowledge systems that preserve institutional know-how, modernized data architecture that supports scalable analytics, and advanced analytics that allow teams to surface actionable insights more quickly."

Continued McDaniel, "These investments are driven by the goal of improving client outcomes and professional productivity. By automating prep-level tasks such as document intake, organization, trial-balance mapping, journal-entry preparation, and reconciliation, our professionals have more capacity to focus on the client. Aprio's acquisition of TimeCredit provides a proven foundation for proprietary AI-enabled workflow solutions that integrate directly into daily engagements, accelerating efficiency while maintaining the human intelligence and relationship focus that is core to our model."

### **Why investments miss the mark**

Despite best intentions, tech investments can fall short and fail to deliver the expected ROI. While the reasons will vary, there are several key factors.

"The biggest ROI constraint is improper adoption. Firms buy the tool, but don't use it as intended or don't

change the underlying workflow. In many cases, realizing the value requires reimagining how work gets done, not simply digitizing the old process. The way firms worked in the past won't be the way they work in the future, and ROI depends on being willing to make changes," said Sekhon of Thomson Reuters. "To mitigate risk, firms should pair implementation with clear process redesign, role-based training, accountability, and measurable KPIs. Treat it as an operational change program, not just a software rollout."

Williams of Intuit agrees that if tools are not used effectively, even the best can fail to deliver results. "Technology investments often fail due to unclear and poorly defined requirements, too many stakeholders driving conflicting priorities, inadequate implementation, insufficient training, and misalignment with a firm's needs and goals," he said. "To mitigate these risks, firms should invest in structured onboarding, ongoing education, and regular check-ins to ensure the technology is delivering against intended goals."

Erazo of GHJ pointed to "unclear objectives, weak change management, and failure to rethink processes" as key issues that can negatively impact ROI.

"Simply layering technology onto old workflows rarely produces meaningful results. Firms can improve ROI by defining success metrics upfront, investing in training, and assigning internal champions who help drive adoption," said Erazo. "Most importantly, they should treat implementation as an opportunity to redesign how work gets done, not just digitize what already exists."

Added McDaniel of Aprio, "Technology investments often fail when firms digitize inefficient processes instead of redesigning them; underinvest in training and change management; or lack governance and accountability

for adoption. Software alone does not transform outcomes. Firms mitigate these risks through phased implementations, structured training programs, leadership sponsorship, and clear ownership of workflows. Measuring results through cycle-time reduction, decreased rework, and increased advisory capacity helps ensure the technology is delivering operational and client value rather than simply adding tools.”

### Signs of an underutilized stack

Another reason tech investments may fail to deliver desired outcomes is that they are underused. According to experts, signs that a tech stack isn't being fully leveraged may include:

- **Manual work persists despite automation.** Does staff rely on spreadsheets, emails, or rekeying data instead of built-in workflows?

- **Low or inconsistent adoption across teams.** This could suggest gaps in training, configuration, or leadership buy-in.

- **Efficiency KPIs don't improve.** Are cycle times, close speed, error rates, realization, or margins largely unchanged after implementation?

- **Workarounds and shadow systems are common.** Tools feel clunky or disconnected, leading to frequent exports/imports, manual reconciliations, or off-system tracking becoming normal.

- **Reporting and insights require heavy manual effort.** This limits timely visibility into firm or client performance.

- **Processes and service quality differ by team or individual.** This makes processes challenging and reduces consistency.

- **The firm keeps buying new tools to fix old problems.** This is happening even though existing software could likely handle them if fully used.

“Common signals include manual

reconciliations that ‘feel necessary,’ frequent data exports between systems, delayed financials despite modern tools, and staff spending more time producing numbers than explaining them. These are symptoms that technology is present, but not trusted or fully operationalized,” Seibert of Digits said.

Richard Corn, director of product management for the accountant channels at Bill, outlined several indicators that a firm may be “leaving value on the table.”

“One of the clearest signs is that the process doesn't feel any faster after implementation. You're not seeing hours leveraged, you're not seeing decreased demand on staffing levels. Those are pretty obvious indicators that the technology hasn't been implemented correctly,” he said.

Continued Corn, “Leaving value on the table often shows up at a more ‘first principles’ level. When a process is migrated to a new workflow, many firms don't account for the need to eliminate unneeded, non-value-add steps. There are lots of steps in typical processes that are really just data manipulation: spreadsheets, downloading, pivots, and manual work to move data ... You're probably leaving value on the table if you implemented a new system without changing the old process. You likely could delete at least a quarter of your steps.”

Developing a tech stack is not a set-it-and-forget-it process. Sources agree that it is important to regularly reassess solutions and processes.

“I think that really intentionally looking at your tech stack that you have in place today and reviewing it on a regular basis to make sure that what you're using is working for your practice as a whole is really important. And I think a lot of times, what happens inside of practices is they implement technol-

ogy, they don't necessarily look at the whole picture with it, and so you can gain a lot of inefficiencies with that,” said Blascoe of CPA.com. “So you're constantly in a review cycle of your technology and the tech stack that you have in place today, and you're looking for those inefficiencies, and you're looking at what you could potentially put in place that would resolve some of those inefficiencies. I think that is the importance of actually ensuring that what you have in place is something that is good for your practice.”

Seibert noted the importance of regular reassessments: “At a minimum, firms should reassess annually. Signals for change include growing headcount without margin improvement, increasing process complexity, or relying on people to ‘bridge the gaps’ between systems. When incremental fixes pile up, it's often a sign the foundation, not the edges, needs rethinking.”

Said Mike Wiesenfarth, head of partnerships at Escalon, a fractional CFO and accounting firm headquartered in Dover, Delaware, “Changing [the] tech stack too often can be disruptive, but we like to keep a close eye on it. We reevaluate solutions quarterly, starting with our current partners. What features do our current partners offer that we can expand to? What are the new trends in our space that might be different from our current solutions?”

For accounting firms, the true value of technology isn't in how many tools are used, but how deliberately those tools are chosen, integrated and utilized. “Stop asking how technology can help you do the work faster and start asking which work it should eliminate entirely,” said Seibert. “The firms that win in the next decade will use technology to compress production and elevate judgment. That's where durable value, differentiation, and growth come from.” **AT**