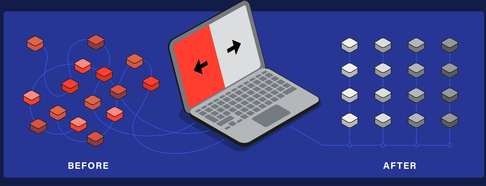
How does your accounting firm's tech stack up?

Take your tech stack from tangled to tidy with help from Rightworks Academy



Whew. You survived busy season! What a relief, right? But now (before you sweep that experience under the rug until the next one) is the perfect time to look at your tech stack and figure out what is—and more importantly, what isn't—working.

SIGNS OF A TANGLED TECH STACK

A firm's tech stack can slowly become snarled, which becomes more noticeable at the worst time possible—busy season. Here are common signs that your tech stack needs tidying:

- Wasting time with manual and time-consuming tasks.
- Burdening staff with paper-based records.
- Drowning in a sea of disconnected apps (i.e., app sprawl).
- Lacking data security due to siloed apps and data.
- Losing staff because of inconsistent onboarding and training.

Do these signs look familiar? We can help!

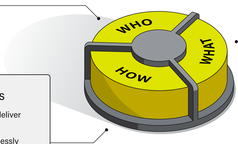
WHERE DO I START?

RETHINK YOUR BUSINESS MODEL

A streamlined tech stack begins with a clear business model. This means knowing:

WHO YOU WANT TO SERVE
- Who do we love to serve?
- Who are we great at serving?

HOW YOU WANT TO DELIVER YOUR PRODUCTS
- What apps can we use to deliver our services?
- What apps integrate seamlessly so we can get real-time data for better insights?



WHAT YOU WANT TO SELL
- What products or services do we want to sell?
- Do we have the right staff for these services?

WHAT SHOULD I CONSIDER?

Use the following as a guide to build a modern tech stack that suits your business model.

HINT Less is more—especially when it comes to your tech stack. Be intentional in what you select.

CLOUD-BASED ENVIRONMENT

Secure and streamline your workflows and storage with one-click access to your curated tech stack in the cloud.

- **Intelligent cloud**: Rightworks OneSpace
- **Cloud storage**: Microsoft OneDrive, Google Drive

CENTRALIZED BUSINESS HUB

Communicate the value of your products and services with one of Rightworks Academy's dynamic and mobile-friendly websites.

- Rightworks Websites

INTEGRATED WORKFLOW APPLICATIONS

Create a frictionless experience with integrated apps within an automated environment.

- **Practice management**: Canopy, Onvio
- **Proposal creation and digital signature apps**: Rightworks Connect Offer, DocuSign, Adobe Acrobat Sign
- **Payroll**: RUN Powered by ADP® Payroll for Partners, QuickBooks Online Payroll, Gusto
- **Accounts payable and receivable**: BILL
- **Receipt management**: Dext Prepare
- **Expense reimbursement**: Expensify
- **Document management system**: SmartVault Accounting Pro

COLLABORATION TOOLS

Collaborate across all document types and communicate with staff and clients via secure messaging and video apps.

- **Team-oriented work tools**: Office 365, Google
- **Team collaboration tools**: Slack, Microsoft Teams, Zoom, Calendly

ACCOUNTING AND TAX APPLICATIONS

Solidify the core of your tech stack with cloud-based (or hosted) accounting platforms.

- **Accounting platform**: QuickBooks® Online, QuickBooks Desktop, Docyt
- **Tax application**: Lacerte, ProSeries

DATA ANALYTICS AND REPORTING

Uncover real-time insights with cloud-based reporting applications.

- Rightworks Connect
- Docyt
- Reach Reporting

ARTIFICIAL INTELLIGENCE

Conduct research and create written communication with AI built specifically for accounting.

- Rightworks Spark

Need help tidying your tech stack?

While streamlining a modern tech stack may feel like an overwhelming task, it can be done. Rightworks Academy knows the amount of time it takes to find and vet the best applications, which is why we've started the work for you.

All that's left is crafting a curated tech stack that supports your firm and your team. And we can help with that too.

Schedule a call with the Academy team to get started.

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