WHITE PAPER

The Franken-stack effect: Is your firm’s tech stack slowing you down?

INTUIT ProConnect™ Tax

For years, the mantra for tax and accounting professionals was to go with "best-of-breed" software as the gold standard for firm management. While this *seemed* reasonable, finding the best tool for every specific task, including tax prep, bookkeeping, document management, practice management, and others, created more chaos than it did cohesion.

If you're of a certain generation, you may remember when Microsoft tools didn't speak to Apple, creating often-complicated solutions that didn't make any firm efficient.

Over the years, firms found themselves trapped in a "Franken-stack," or a puzzle piece collection of software that required manual workarounds. If you feel like your team is spending more time managing software than serving clients, you aren't alone. Recent research, including the 2025 Accountant Technology Survey, reveals a profession at a crossroads, where the tools meant to drive efficiency have become a primary source of friction. This is not a problem to take lightly.

"Any time a firm owner sees friction inside their practice, I think it's one of their number-one jobs to help remove that friction," said Darren Root, CPA, founder of Rootworks, now known as Rightworks. "Friction creates frustration."

The patchwork problem: When more isn't better

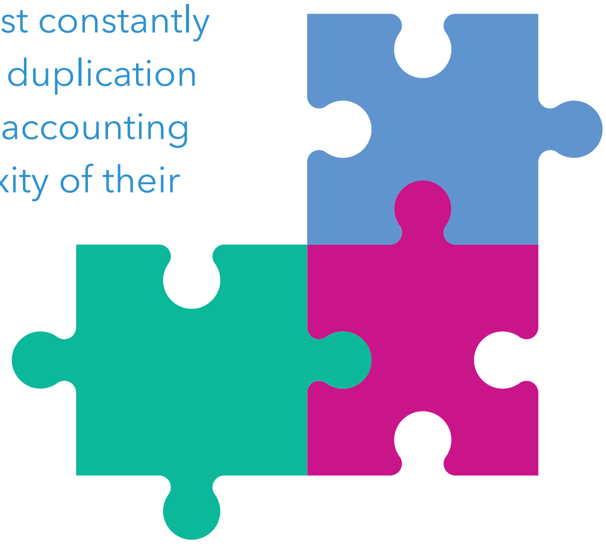
According to the 2025 Accountant Technology Survey, the average firm manages approximately eight different digital tools just to handle core operations. While each individual application might be powerful, when software exists in a vacuum, the firm's data becomes fragmented.

Consider the typical lifecycle of a client engagement. The data starts in the bookkeeping software, moves to a spreadsheet for adjustments, gets manually entered into tax software, and is tracked in a separate workflow management tool.

Randy Hughes III, CPA, founder of Counting Pennies LLC, is no stranger to multi-step processes in accounting and advisory. "Once upon a time, our firm had to manually do calculations in Excel. We had to build the narrative in Word, then we'd have to create a PDF."

Every hand off between these systems is a potential point of failure. In fact, 41% of accountants in the survey admit that their firm struggles with manual entry inefficiencies caused directly by a lack of software integration.

This isn't just a technical problem; it's a productivity killer. When systems aren't aligned, staff must constantly move data from one screen to another. This duplication of effort is more than just annoying; 66% of accounting professionals feel burdened by the complexity of their firm's technology … *on a weekly basis*.

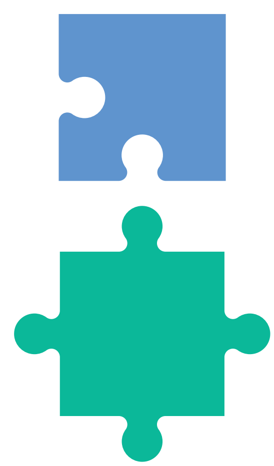


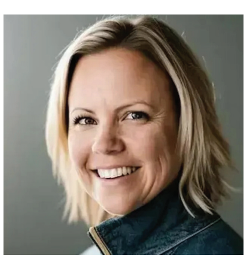
The invisible cost of workflow fragmentation

Workflow fragmentation is the silent tax on your firm's profitability. It is the mental energy and time lost when staff have to stop working in one environment and recalibrate for another.

The inefficiencies are quantifiable. Beyond the 41% of firms that struggle with manual entry, another 44% of firms report elevated software costs because they are paying for overlapping features across multiple platforms. Furthermore, 33% of firms find that training new staff takes significantly longer because there isn't a single system to learn. Instead, new hires must master a half-dozen different interfaces, each with its own logic and quirks.

The mental load is perhaps the most significant, yet overlooked, cost. In a profession already battling burnout and a talent crunch, asking staff to navigate a disjointed tech stack adds unnecessary stress. Interestingly, 86% of accountants who use more integrated, automated tools report a significant reduction in their daily mental load. This suggests that the solution to burnout isn't necessarily working fewer hours; it's working in a more cohesive environment. Simply by making workflows more efficient and intuitive, a comprehensive tech stack can improve morale and talent retention.





"Any time you can reduce that manual entry, you've just made a tax professional's day," said Megan Leesley, CPA, director of tax at Dark Horse CPAs.

The case for a platform strategy

To break the cycle of fragmentation, firms must create a platform strategy. This doesn't mean finding one piece of software that does everything perfectly; it means choosing a core ecosystem where the most critical functions are natively integrated.

The goal is to get to a place where your tech stack "supports your process, instead of defining it," said Luke Templin, who built four Client Advisory and Accounting lines and is CEO of the SaaS app FinDaily.io. In other words, technology should be a tool, rather than a task.

The benefits of this shift are overwhelming. Survey data shows that 98% of accountants acknowledge the benefits of standardizing their technology stacks. Standardization simplifies everything from client onboarding to data security. When your firm operates on a unified platform, you create a single source of truth, and even if that sounds like a cliché, it resonates during busy season, and really, year round.

The survey reports that only about 36% of firms have fully standardized their tech stacks across their staff and clients, but those that have are seeing real results they can quantify, leading to measurable capacity through automation. Firms that move away from the patchwork approach report that technology helps them cut compliance time significantly, with 95% reporting that automation and integration allow them to spend less time on the basics and more time on high-value work.

A unified tech stack can also boost client satisfaction. No, your clients probably don't know or care about the specific software solutions you use. But they're sure to appreciate a system that facilitates direct communication, simplifies tasks like document transfer and upload, and frees up your time to offer high-value advisory services.

The gold standard: Books, tax, and workflow

The ultimate goal for any firm is a solid integration between their books, tax, and workflow. When these three areas are synchronized, the firm moves from being reactive to proactive.

1. Integrated books and tax

The traditional tax season is often a frantic race to clean up year-old data. When the bookkeeping and tax systems are integrated, tax preparation becomes a year-round, automated byproduct of solid accounting. Data flows from the general ledger directly into the tax returns, reducing the 98% of errors often associated with manual data entry.

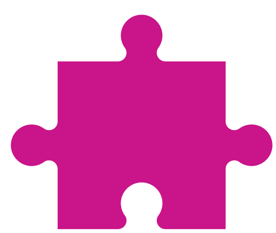
2. Integrated workflow

Workflow should not be a separate checklist that lives in a project management tool. Instead, it should trigger actions based on real-time data. For example, when a bank reconciliation is completed, the workflow tool should automatically notify the reviewer or move the project to the next stage. This level of automation is why 97% of accountants report that better integration leads directly to improved workflow efficiency.

3. Real-time insights

When books, tax, and workflow live in the same ecosystem, the firm can provide real-time advisory services. Currently, 79% of accountants expect a surge in strategic advisory work well into 2026. But are their firms actually ready to provide it? After all, you cannot provide "strategic" advice if you are looking at data that is three months old and buried in a disconnected spreadsheet. A unified stack provides the analytics necessary to offer deep business insights on demand. To learn more, take a look at this case study that focuses on how to scale advisory services to your clients.

Overcoming the resistance to change



If the benefits of a unified platform are so evident, why are firms stuck with systems that are siloed?

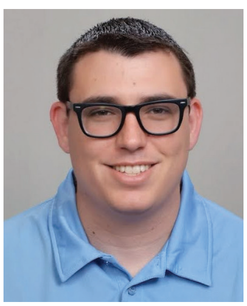
Resistance to change is a major hurdle. About 51% of firms believe client resistance is the barrier to tech adoption, while 39% point to a lack of technical skills among their own staff. Then there are the firms that have already spent years and lots of money on their current tech stack, making it even more painful to switch. Decision paralysis is a factor, too. With so many options on the market, researching and comparing various platforms can feel totally overwhelming.

However, the cost of staying the course is higher than the cost of change; 85% of accountants believe that failing to adopt and consolidate new technology will directly harm their firm's growth goals. The firms that are winning are those that treat their tech stacks as strategic solutions—and places of constant evolution.

Your tech needs will probably look different three years from now compared to today, and that's natural. No one can predict the future. All you can do is make the best possible choices for your business and clients, using the information and options you have available right now.

In a way, updating your tech stack can be an impactful opportunity for level-setting and future planning. Who are your ideal clients? What do you do better than the competition? What services would you most like to offer? What's holding you back from doing the work of your dreams—and would accelerate your journey toward that ideal future?

Once your vision comes into focus, look for tech solutions that can help you achieve it.

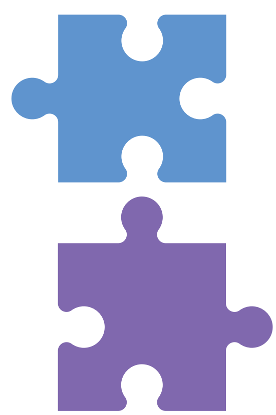


Creating a functional tech stack: Trevor Betts, EA

Trevor Betts, EA, president of Virtual Tax Solutions in California, is serious about tech stack integration. How serious? He made a flowchart that illustrates how his impressive suite of solutions work together. ProConnect Tax is at the heart of it all. It "allows me to use live integrations that I never could before with my previous software," he said.

He's not kidding. Betts has built a comprehensive web of interlocking tools, with ProConnect Tax, his client portal, his document and practice management systems, and even his phone line working together in various ways.

Say a client calls Betts about their tax return. His tech set-up ensures the call will be recorded, transcribed, and AI-summarized, then easily saved within his practice management system, Karbon. Weeks later, when Betts starts working on that client's return in ProConnect Tax, its integration with Karbon means he can use the notes to jog his memory and check off all action items, without breaking a sweat.



True team collaboration: Elizabeth Hanley, EA

When you have around 800 clients and firm branches in major cities on both coasts—as is the case for Liz Hanley, EA, CEO of Liz Is All Biz Inc.—it's all too easy to let things slip through the cracks. Not on Hanley's watch. **She uses ProConnect Tax to keep her practice running smoothly, no matter how busy it gets.**

Segmentation and automation keep Hanley's practice thriving. Each member of her 15-person, all-female team handles tasks matched to their practice level and skillset, and Hanley has built a tech stack that enables these disparate pieces to fit together neatly. "When Person A finishes something, it then moves to Person B, who does the next thing," Hanley said. "It's all automated."

Because her team uses ProConnect Tax, nothing gets lost in translation. "If you are tagged in to deal with a client you've never seen before, you would have all the context right there: everyone's notes, all the documents, and all the materials from the client.," Hanley says. Even client emails are there to review, thanks to an integration with the practice management system Karbon. "It's all in one place," she said. "You can't lose anything."

The Deduct This podcast

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Many of the topics discussed in this case study have been featured on Deduct This, an award-winning podcast that is a resource for tax and accounting firm owners and professionals. Hosted by industry veterans Carrie Hammond and Lexi Bonicard, the weekly podcast offers insightful peer-to-peer conversations designed to elevate practices and navigate the evolving landscape of the tax and accounting profession.

Deduct This dives deep into the critical topics that matter most to today's firm owners. Listeners can expect actionable tips and candid discussions on:

- **Integrating advisory services:** Learn how to strategically expand your practice beyond compliance and offer high-value advisory services that clients demand.
- **Top-tier tax tools:** Discover the latest and most effective tax software and solutions to streamline workflows and enhance efficiency.
- **Leveraging AI in the profession:** Unpack the potential of artificial intelligence to revolutionize your firm, from automating tasks to generating deeper insights.

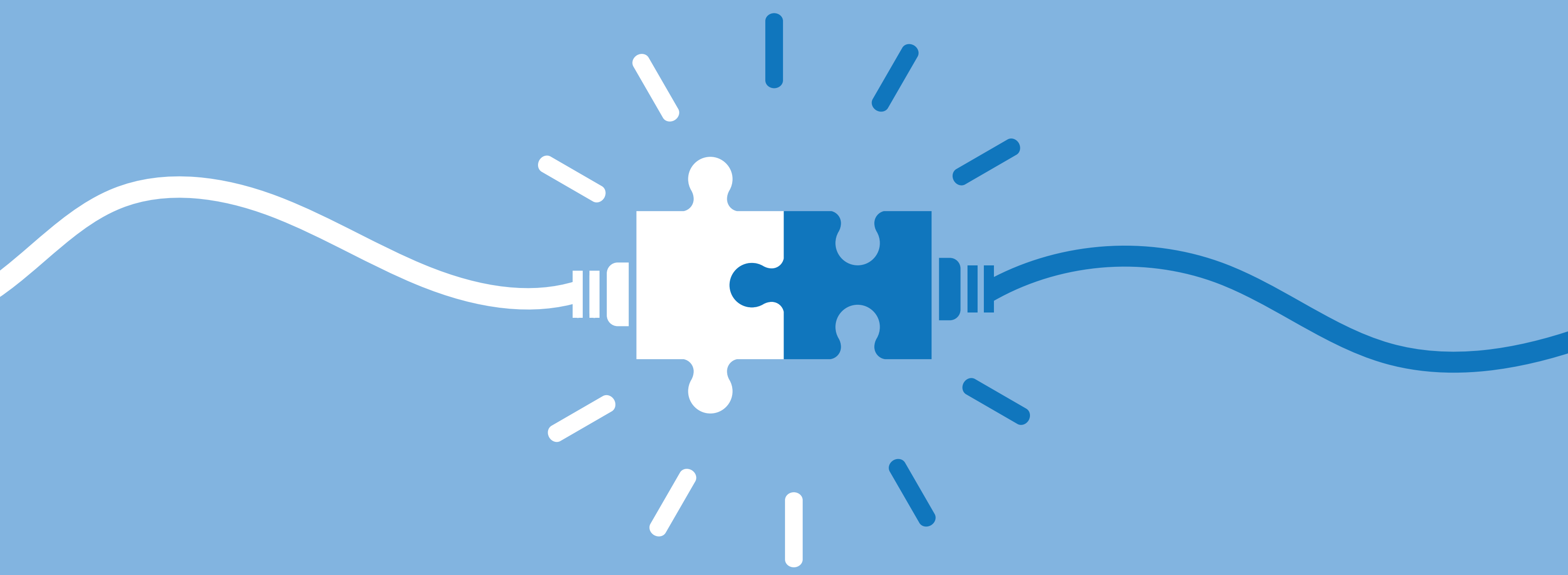
ProConnect Tax: Connect the unconnected

The age of unconnected tools is past. The future belongs to firms that prioritize a platform strategy to bridge the gap between books, tax, and workflow.

By consolidating your tools and embracing a unified ecosystem, you don't just speed up your workflow; you clear the path for your firm to become more efficient, enabling growth.

Consider Intuit's platform ecosystem, beginning with Intuit® ProConnect™ Tax, already integrated with QuickBooks® Online Accountant, and soon to be a substantial feature in Intuit® Accountant Suite. ProConnect Tax is cloud-based professional tax software that allows you to create tax returns in minutes, from anywhere. ProConnect Tax streamlines workflows, automates tasks and reduces manual data entry errors, and creates efficiencies so work is completed faster.

Integrating with ProConnect Tax is Intuit Tax Advisor, an advisory tool that automatically generates strategies for client tax savings, as well as an integration with SmartVault and Karbon.



Schedule a demo or call **844-818-5406** to speak with a tax software specialist.