The modern firm's foundation for sustainable growth

How top accounting teams are consolidating firm workflow and client experience into one platform — creating clarity, capacity, and confidence.

TAXDOME

This guide is for accounting firm owners, partners, and operations leads who are serious about growth — but tired of building that growth on a shaky tech foundation. We'll take a close look at what's really costing firms time and focus, how consolidation helps create capacity, and how real firms are already making the shift.



> You don't build a firm to manage software. You build it to serve people, lead a team, and grow something meaningful.

Ilya Radzinsky,
co-founder & CPO at TaxDome

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This isn’t about busy season

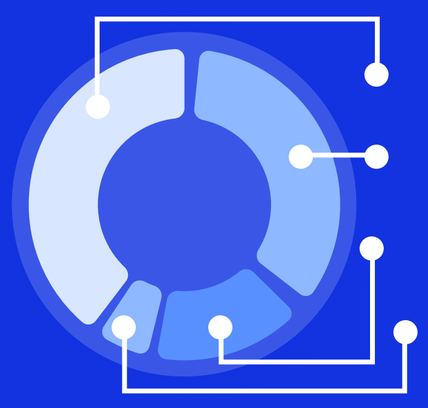
Sometimes, it takes too much just to get through the day.

Six tabs are open. Teams keeps lighting up. Someone replies to an old email thread no one remembers the context for. A client sends over documents via WhatsApp — along with answers to your organizer that you now have to copy into a spreadsheet.

It’s a normal Tuesday — and **it’s exhausting.**

You’re not alone.

What today’s tech stack looks like for most firms



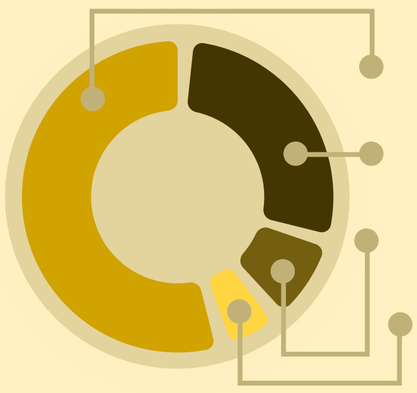
45% use 1–5 tools
40% use 6–10 tools
10% use 11–15 tools
3% use 20+ tools

Most accounting teams today are running on a patchwork of disconnected tools — not by choice, but because growth happened faster than their systems could keep up.

This isn’t about busy season

And that kind of growth is something to be proud of, but it needs the right foundation underneath. What worked at 3 people breaks at 10. By 25, it’s a game of duct tape and crossed fingers.

What firms want their stack to look like in 3 years



57% want to use 1–5 tools
29% want to use 6–10
7% want to use 11–15
3% want to use 16–20

Now, more firms are recognizing that moment as a turning point and rethinking what comes next.

Source: 2024 CPA Practice Advisor Survey

That shift is leading to harder — and smarter — questions. Not just “What tools are we using?” but “What are those tools costing us?”

Where the cracks start to show

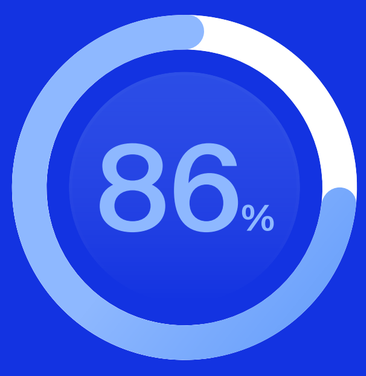
Growth without structure always leaves a trace. Sometimes it looks like a missed email. Other times, it’s a lost client or another month of unused software fees.

Client trust starts to slip.

When clients have to dig through email threads, track down shared folders, or resend documents twice, frustration builds. Even if they don’t say anything, they notice.



of accounting clients are satisfied



expect one place for all firm interactions

Only 48% of clients say they’re satisfied with their accountant — and 86% say they want everything in one place. When that clarity is missing, confidence quietly erodes.

Source: TaxDome Accounting Client Satisfaction Report

Where the cracks start to show

Your team loses time and energy.

Work doesn’t slow down when your tools multiply — but people do.

4 hours

lost per employee every week

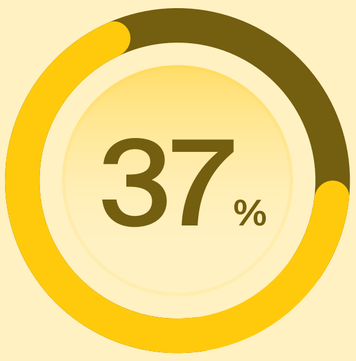
Source: Harvard Business Review

Professionals lose four hours every week just switching between apps and trying to regain focus. That’s half a day lost to inefficiency. Multiply that across the team, and you're not just losing time — you're losing momentum.

Those hours could go toward serving more clients, training new team members, or focusing on higher-value work that drives the firm forward.

Budgets take a hit, too.

The more tools in your stack, the easier it is for subscriptions to pile up unnoticed.



of accounting clients are satisfied

On average, companies waste over one-third of their software spend on tools they barely use. Those costs aren’t always obvious. But they’re always there.

Source: 1E Report

Is your tech stack helping or holding you back?

Take this quick quiz to assess how well your systems support your firm. Then total your score to see where you stand.

1. How many tools or platforms does your firm currently use to run daily operations?

- [ ] 1 – 1-5
- [ ] 2 – 6-10
- [ ] 3 – More than 10

2. To complete a typical task, how often do you switch between different apps or platforms?

- [ ] 1 – Once or not at all
- [ ] 2 – Two to three times
- [ ] 3 – More than three times

3. How clearly can you see the status of client work at any given moment?

- [ ] 1 – It’s always visible in one place
- [ ] 2 – I can find it, but it takes some digging
- [ ] 3 – I often have to ask someone or check multiple systems

4. When a client uploads a document or reaches out, how easy is it to respond or take action?

- [ ] 1 – I get notified and can act on it right away
- [ ] 2 – I usually find it, but it takes effort
- [ ] 3 – Things often fall through the cracks or get delayed

Is your tech stack helping or holding you back?

5. How often do clients ask questions like “Where do I upload this?” or “What’s the status of my return?”

- [ ] 1 – Rarely , they know where to go and what’s next
- [ ] 2 – Sometimes, we get a few confused emails
- [ ] 3 – Often, we’re answering the same questions over and over

6. How confident are you that your team is following the same workflows?

- [ ] 1 – Very confident, we have standardized processes
- [ ] 2 – Somewhat, it depends on who’s handling the task
- [ ] 3 – Not confident, everyone does things their own way

7. When onboarding a new employee, how hard is it to get them up and running?

- [ ] 1 – It’s quick and consistent
- [ ] 2 – It takes a few days and a lot of explanation
- [ ] 3 – It’s slow and complicated — lots of tools to learn

8. If a teammate is out unexpectedly, how easy is it to pick up where they left off?

- [ ] 1 – Very easy, everything’s tracked and visible
- [ ] 2 – Possible, but takes time to figure out
- [ ] 3 – Difficult, info is scattered and hard to find

9. If your firm doubled in size tomorrow, would your systems be ready?

- [ ] 1 – Yes, we’re set up to scale
- [ ] 2 – Maybe, but we’d feel the strain
- [ ] 3 – No, we’d need to overhaul everything

Scoring

9–13
points

You’re in a strong position. Your systems are supporting your workflow well — but staying proactive will help you scale without stress.

14–20
points

The inefficiencies are adding up. Your team is losing hours, your clients are feeling it, and growth may soon hit a ceiling.

21–27
points

Your stack is working against you. The risk of client churn, burnout, or missed deadlines is real. It’s time for a foundational change.

If your score wasn’t where you’d like it to be, you’re not alone. Most growing firms don’t realize how much their systems are holding them back — until they step back and really look.

Growth starts with a single source of truth

Once you see the cracks, it’s hard to unsee them.

So what kind of system can actually keep up as you grow?

The answer is **one place to manage your clients, your team, and all your work.**

TaxDome brings everything under one roof and changes how your whole day feels. You open your laptop and see exactly where things stand. Your team isn’t pinging you with questions — they’re executing. Clients respond within hours, not days.

That's real visibility you can rely on. And everyone — your team and your clients — feels that peace of mind.



> TaxDome has been a huge success for us, and meeting not only our client expectations but our employee expectations as well... As we continue to grow as a company, TaxDome is able to grow with us.

Chris Farris,
COO, Foundation Group
(50+ staff, 3,000+ clients)

Growth starts with a single source of truth

Sure, you save money. Sure, you save time.

But the real win is strategic: higher client retention, better team productivity... and that feeling of calm confidence when you start your workday.

Priority jobs | **Pending signatures** | **Time utilization** | **Tasks and job assignments** | **Completed tasks** | **Operational reports** | **Paid revenue**



Single source of truth for management

When your entire practice lives inside TaxDome

Remember counting your tools back in the quiz? Odds are, it was more than you expected. Some have become so familiar, you barely notice them anymore. Others were quick fixes until something better came along, but it never did. Now you're juggling overlapping tools while still filling the gaps manually.

This table shows just how much you could reclaim — in cost, time, and sanity — by consolidating everything inside TaxDome. Check out our plans to see what's included.

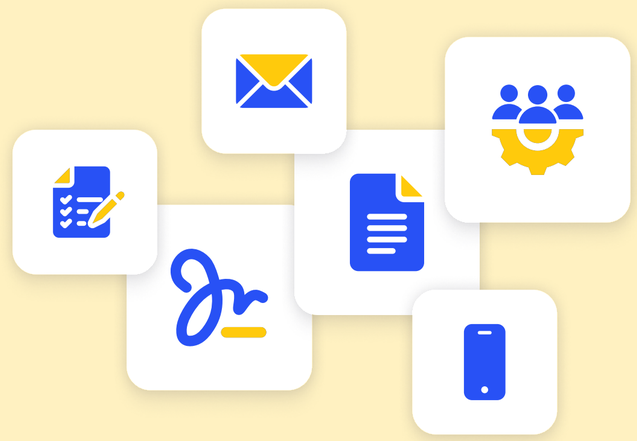
OPERATION	TOOLS YOU MIGHT BE USING TODAY	WHAT TAXDOME GIVES YOU INSTEAD	ESTIMATED MONTHLY SAVINGS*
Client management	HubSpot, Pipedrive, Zoho	Built-in CRM with statuses, tags, and one-click access to client history	$50–$200
Project management	Trello, ClickUp, Monday.com, Jetpack Workflow	Custom job tracking system with visibility across staff, conditional automations, due dates, and workload management	$30–$100
Client communication	WhatsApp, SMS apps, email	Secure client portal messaging with real-time updates and full context tied to each account	<10$
Internal communication	Slack, MS Teams, SMS apps, email	Internal notes, team mentions, and private staff messages within client chats	$30–$100
Document management	Google Drive, Dropbox, SmartVault	Centralized storage with structured client folders, built-in PDF tools, scanning, and secure uploads	$20–$100
Forms and organizers	Typeform, Google Forms	Interactive organizers with conditional logic, autofill fields, and standardized data capture	$20–$50
E-signatures	DocuSign, PandaDoc, HelloSign	Unlimited e-signatures compliant with IRS regulations, E-Sign Act, UETA, and KBA	$20–$60
Invoicing and payments	QuickBooks Invoicing, FreshBooks, Ignition	Recurring branded invoices, invoice-locked documents, secure payment processing, automations, partial payments	$20–$50
Time tracking and billing	Toggl, Harvest	Integrated time tracking with real-time reporting and revenue insights	$10–$30
Scheduling	Calendly, Acuity Scheduling	Built-in client scheduling directly inside the portal	$10–$30
Bookkeeping	Keeper, Uncat	Direct integration with your clients' GL, quality control, uncategorized transactions management, and more (coming soon)	$30–$100

* These costs are approximate and can vary based on the specific features and subscription tiers chosen.

The consolidation story behind a 1,000-client firm

Siebert & Associates faced a challenge many firms know too well: nothing worked together. With just 11 employees supporting over 1,000 clients, this Ohio-based firm was operating at scale — but on a shaky foundation.

Project management lived in Practice CS. Documents were stored in FileCabinet CS. Ongoing work ran through Workpapers. They used CanvaDoc for e-signatures, UltraTax for forms, and email or phone calls to connect the dots. **Technically, everything had a "place." But nothing worked together.**



That left the team caught in an exhausting cycle. They lost hours bouncing between tabs, manually copying information, re-uploading files, and chasing updates. Clients were confused by fragmented touchpoints. What should've been a quick update turned into a five-step back-and-forth. Clients didn't feel informed. The team didn't feel efficient. And nobody felt confident.

Switching to TaxDome changed all of that.



> It's not hyperbole that everybody here lives in TaxDome from the time they get here until the time they leave at the end of the day.

John Siebert,
Owner, Siebert & Associates,
CPAs (10 staff, 1,000+ clients)

The consolidation story behind a 1,000-client firm

Now, everything — messages, approvals, uploads, payments — happens in one place. No more wondering where something was sent or who saw what. Just a clearer, faster way to work.

And their clients noticed.



> We've got reviews on Google saying, 'Hey, these portals are fantastic, thank you for changing.' It exceeded my expectations.

Hope Siebert,
Office Manager, Siebert & Associates,
CPAs (10 staff, 1,000+ clients)

The difference TaxDome makes

BEFORE 👎	AFTER 👍
Delivery bottlenecks: 5+ disconnected tools created delays and slowed turnaround	**Aligned teams, faster output:** one platform keeps everyone on track and in sync
Client frustration: confusing portal experience led to disengagement	**Higher client engagement:** even tech-averse clients now easily interact through the mobile app
Document delays: complicated portal led to weeks of client response delays	**Earlier tax season readiness:** clients submit documents 1-2 months earlier
Revenue gaps: ignored billing requests created cash flow problems	**Faster payment cycle:** 42% of clients now respond to billing notifications within 24 hours
Time drain: each tax return setup required 20+ minutes of work	**More billable hours:** setup time cut by 90%, from 20+ minutes to just 2-5

Making the switch without slowing down

Seeing what’s possible is inspiring. But taking the first step? That’s where firms sometimes hesitate.

Maybe your team has already adapted to your current systems, even if they’re clunky. Maybe you’re unsure about moving data, retraining staff, or whether your clients are ready.

We get it. At TaxDome, we’ve helped thousands of firms through this exact transition. And here’s what they often realize:



> **The client is aware of modern technology. The biggest issue was my mind block. And once you get past your mind block, then your client doesn’t have a problem moving forward.**

Olander Fleming,
OC Fleming Tax

Making the switch without slowing down

Change always feels bigger before you begin. But once the hesitation clears, **what's left is a path that's structured, supported, and entirely doable**. TaxDome's migration process is designed to work with your firm's pace, not against it.

MIGRATION STAGE	IMPORTANT STEPS
Stage 1: Kick-off meeting	We align on your goals, systems, and timeline and build your custom migration plan.
Stage 2: Data migration	We help you import clients, documents, and key data from your current tools.
Stage 3: Workflow optimization	We review your processes and rebuild them inside TaxDome for better efficiency.
Stage 4: Team onboarding	Your team gets hands-on training with your real workflows — not generic setups.
Stage 5: Client adoption	We help you introduce the portal to clients and encourage early engagement.
Stage 6: Go live	You launch with continued support from the same team that guided you through setup.

Clean operations create space for smarter growth

Firms don’t stall because they’re lacking talent or ambition. They stall when their foundational systems can't support the pace they’re trying to maintain. Tool sprawl, disconnected workflows, and manual tasks chip away at time, focus, and confidence.

Real growth comes from creating a space to work with clear visibility, consistent processes, and a platform that keeps everything (and everyone) in sync.

That’s exactly what TaxDome is built for.



> For everything to be on one platform, it’s huge. It costs us less money too. Having everything centralized in TaxDome helps us, and it helps the client.

Ricardo Ardiles,
Partner & President, Pharma Tax
(13 staff, 180 business clients)

See the possibilities for your firm.

Book a demo to share your goals — and discover how TaxDome will help you achieve them.

Book a demo

About TaxDome

TaxDome provides practice management software that addresses all touchpoints in client and team management. We help full-service accounting firms leverage technology to exceed clients' expectations, operate at a higher efficiency rate than ever, manage teams from anywhere in the world, and gain unrealized insights to help them scale.

We're trusted by more than 30,000 tax, bookkeeping, and accounting professionals worldwide, from rural towns in North America, across varied industry landscapes in the EU, and through the busy city streets of Japan. Top firms trust us to help them better serve their clients, increase their team's productivity, and scale their practice.

Industry leader trusted by
30,000+ tax, bookkeeping, and accounting professionals worldwide

