CANOPY SUMMIT

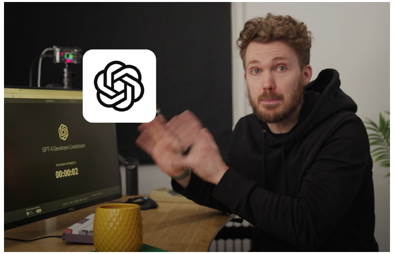
2025

YOU ARE WHAT YOU DO

JASON STAATS

Former Firm-Runner

Bought an 80 year old firm, grew it to a team of 40 based in Oregon



Content Creation

Published two videos per week to YouTube for 18 months

Realize

2021: launched Realize, an accounting alliance for today's modern firm

Jason On Firms

2023: launched a podcast & YouTube show called *Jason On Firms*


STREET CRED
STREET CRED
Built a personal practice to $5M
Grew an 80 year old tax firm from $3M to $5M


DID HE SAY HE DOESN'T RUN A FIRM ANYMORE?

What I do now:

Learn from 600 firms in my community
Learn from 1,500 firms engaging with the daily pod
Learn from brands building the future
Learn from the people I meet at live events
Learn from the tens of thousands of firms hanging out online


PRACTICE MANAGEMENT
33

PM PICKER GUIDE

Practice Management System
Recommender

A tool for 🇺🇸US tax & bookkeeping firms

Why should I trust you!?

⛔ No affiliates deals
⛔ No selling leads
⛔ No back-door deals
✅ I'm not a sales person

I've worked with over a thousand accounting firms in the past two years, on every platform imaginable. I'm probably just the most informed friend you have on the subject.

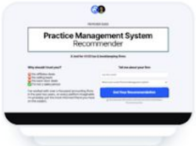
Tell me about your firm

Your first name?

What's your current Practice Management system?

Get Your Recommendation

🔒 Your personal information will never be sold to advertisers.
No email required.

	Name	Tags	Steps	Unique visitors	Pageviews	Opt-ins
	PM Recommendation Live https://www.jasononfirms.com/pmrec Updated last month		76	2,921	9,860	5,274

What was the last system you used for practice management, before the system you use now?

Approximately when did you change systems?

In 2-3 sentences, what would you tell a firm like yours about the change? Traps to avoid, or any regrets?

Last, to ensure you're a real firm and a PM didn't ask you to leave these comments, who are you? A link to a LinkedIn profile, website, or something else convincing will do.

Jason Staats, CPA • You
I help accountants run more profitable, calm firms
Visit my website
3w •

34 practice management systems entered, only 9 remain, my top recommendations ✨PLUS✨ a quick way to get a rec personalized for your firm:

If you're a 🇺🇸US firm that does tax and/or bookkeeping work, you should be entering 2025 on one of these 9 systems:

Qount
Karbon
Canopy
Firm360
TaxDome
Client Hub
Keeper.app
Financial Cents
Uku - Accounting Practice Management Software

I put together a tool that will take this even further, giving you 1 top recommendation, and 2 secondary recommendations depending on the type of firm you run. Only takes a few minutes, no email required, find it here: https://lnkd.in/gni9vag9

Your PM is the most important tool in your firm 🧠

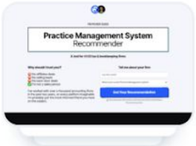
I burned 3 years of productivity choosing the WRONG system (Practice CS) because I got suckered by a sales person and the marketing trap of "integrations".

I burned 4 years running my accounting practice on a mainstream tool (ClickUp) because I thought what I needed was the ultimate creative canvas (these are the people who will fight me most). Almost everyone I talk to has gone through this phase, and nearly all returned to industry tech.

Also let me know below, what PM did you get? Agree or disagree? Is your PM *certified fresh*™?

Tony Wilson, CPA, CMA and 293 others 159 comments · 17 reposts

Reactions

	Name	Tags	Steps	Unique visitors	Pageviews	Opt-ins
	PM Recommendation Live https://www.jasononfirms.com/pmrec Updated last month		76	2,921	9,860	5,274

Agenda

1. **Taking Stock of What We Do**
   Auditing our time to ensure we're moving forward
2. **Tax Intake Deskilled**
   Breaking through remaining fears or concerns
3. **Pre Accounting Deskilled**
   The weekly habits to ensure your firm rides the wave
4. **Technical Review Deskilled**
   The weekly habits to ensure your firm rides the wave
5. **Taming The Email Monster**
   The weekly habits to ensure your firm rides the wave
6. **Client Communication Reimagined**
   The weekly habits to ensure your firm rides the wave
7. **Sticking The Landing**
   The weekly habits to ensure your firm rides the wave

1

Taking stock of what we do

The evolution of who I am

Should be reflected in
the tasks I do

What we are:

Scarce
Experts
Mentors
Advisors
In-demand

What we aren't:

Document gatherers
Personal assistants
Overpriced admins

When clients don’t understand what we do, perception is reality

Most accountants will live the same 5 years on repeat

The same applies to our staff

2 Tax intake deskilled

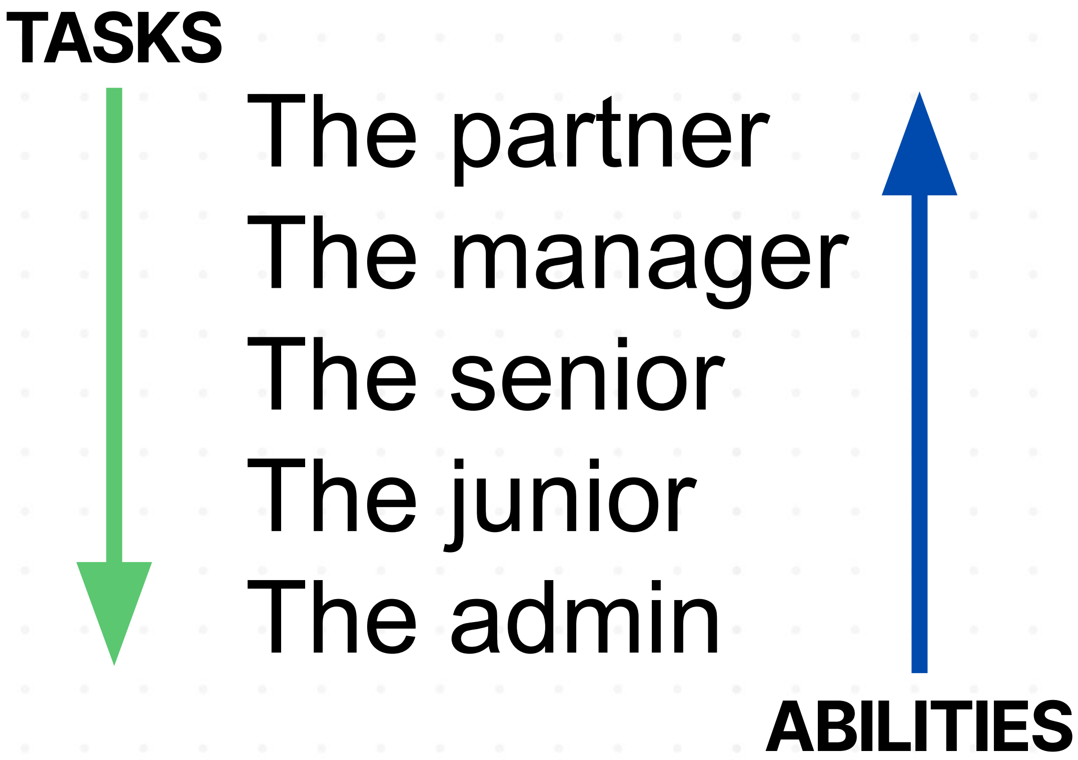
When should the 1040 project begin?

When the client asks what they need to provide
When we get the first piece of info from a client
When the client sends back the organizer
When they tell us to work on it
When all the info is in

Whose job should it be to gather the info?

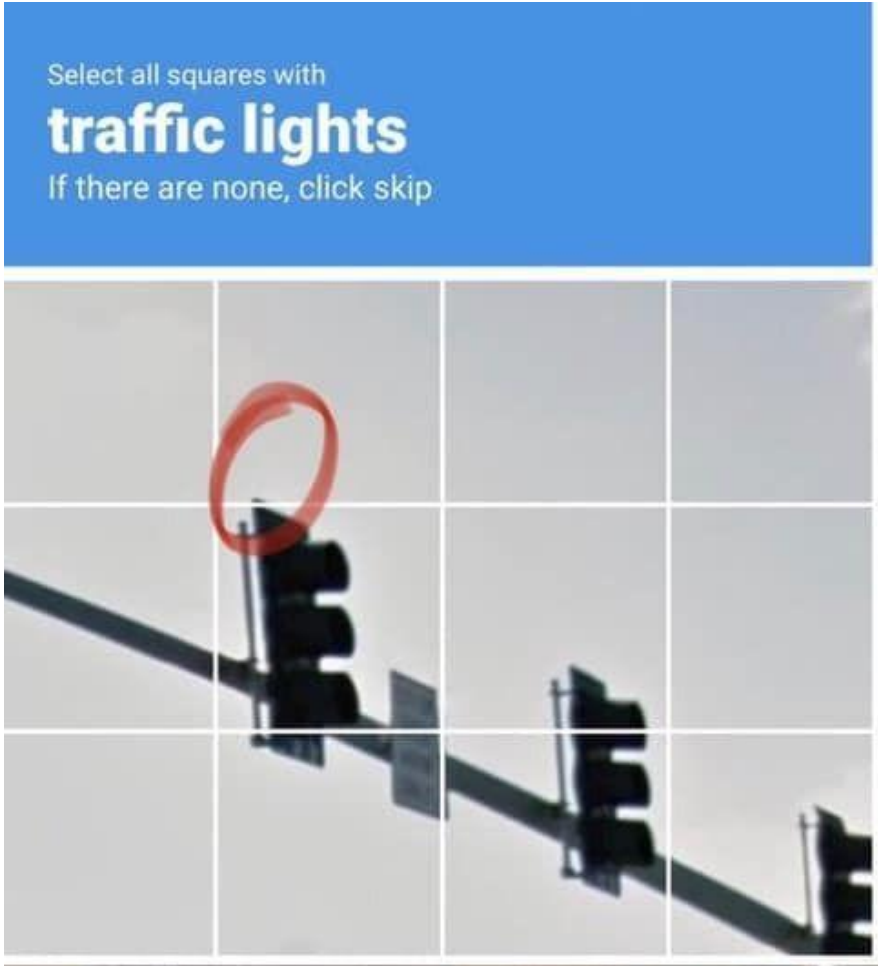
The partner
The manager
The senior
The junior
The admin

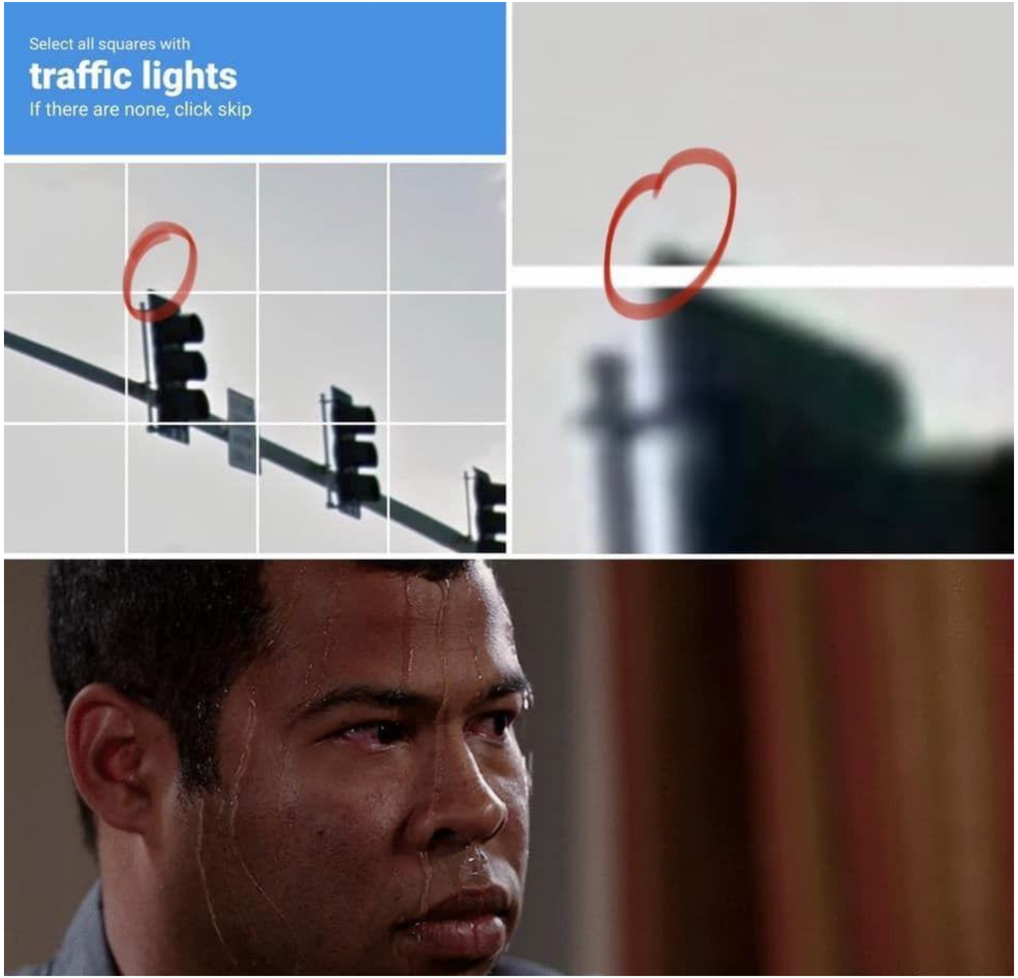
Tasks can’t move until they have someone to move to


TASKS
The partner
The manager
The senior
The junior
The admin
ABILITIES

The admin doesn’t know what we need!
They’ve never talked to the client!
What if the client has questions?
What will my professional staff do?

Work through what’s blocking you


Select all squares with
traffic lights
If there are none, click skip


Select all squares with
traffic lights
If there are none, click skip

3

Pre accounting

deskilled

How most month-end closes go

Target date is the 12th
Start work on the 10th
Client's login doesn't work
They get back to you on the 12th

Whose job should it be to gather the info?

The partner
The manager
The senior
The junior
The admin

Client 1

Wells fargo bank stmt
Screenshot of loan bal from site
Ask client for COGS report
CC statement available 24th
Download CC activity 24th-EOM
Screenshot EOM CC balance

Client 2

Chase bank stmts
Invoices from legacy system
Wells fargo LOC stmt
Receipts from google drive

Client 3

Download transactions from
First East West National
Download stmts from FEWN
Have Craig send you Amex
statement allocation
Wage garnishment balance
report from state website

Preaccounting

File Edit View Insert Format Data Tools Extensions Help

G13 | fx TRUE

	Title	Client	Type	Source	Destination	January	February	March
2	Wells Fargo Stmt #8234	Client 1	Checking Statement	https://wellsfargo.com/	Client file	☑	☑	☐
3	Trailer Loan #5492	Client 1	Screenshot	https://trailerlender.com/	Client file	☑	☑	☐
4	COGS Report	Client 1	PDF Report	jim@client1.com	Teams message to Tammy	☑	☐	☐
5	Capital One Stmt #9023	Client 1	CC Statement	tina@client1.com	Client file	☑	☑	☐
6	CC activity thru EOM	Client 1	Transaction Download	https://capitalone.com/	QuickBooks, client file	☑	☑	☐
7	CC EOM balance	Client 1	Screenshot	https://capitalone.com/	Client file	☑	☐	☐
8	Chase Bank Stmt #2324	Client 2	Checking Statement	https://www.chase.com/	Client file	☑	☑	☐
9	Chase Bank Stmt #0249	Client 2	Checking Statement	https://www.chase.com/	Client file	☑	☐	☐
10	Invoices from Builderoo	Client 2	PDF Report	chase@client2.com	Client file	☑	☑	☐
11	Wells fargo LOC stmt #9224	Client 2	Checking Statement	https://wellsfargo.com/	Client file	☑	☑	☐
12	Receipts from Google Drive	Client 2	PDF Report	Client's google drive	Send them to Becky	☑	☑	☐
13	FEWN #9234 transactions	Client 3	Transaction Download	https://fewn.com/	Xero, client file	☑	☑	☐
14	FEWN #9234 statement	Client 3	Checking Statement	https://fewn.com/	Client file	☑	☐	☐
15	Allocated AMEX stmt	Client 3	CC Statement	craig@client2.com	Client file	☑	☐	☐
16	Wage garnishment report	Client 3	Screenshot	https://texasdoj.com/	Client file	☑	☐	☐

TASKS

The partner
The manager
The senior
The junior
The admin

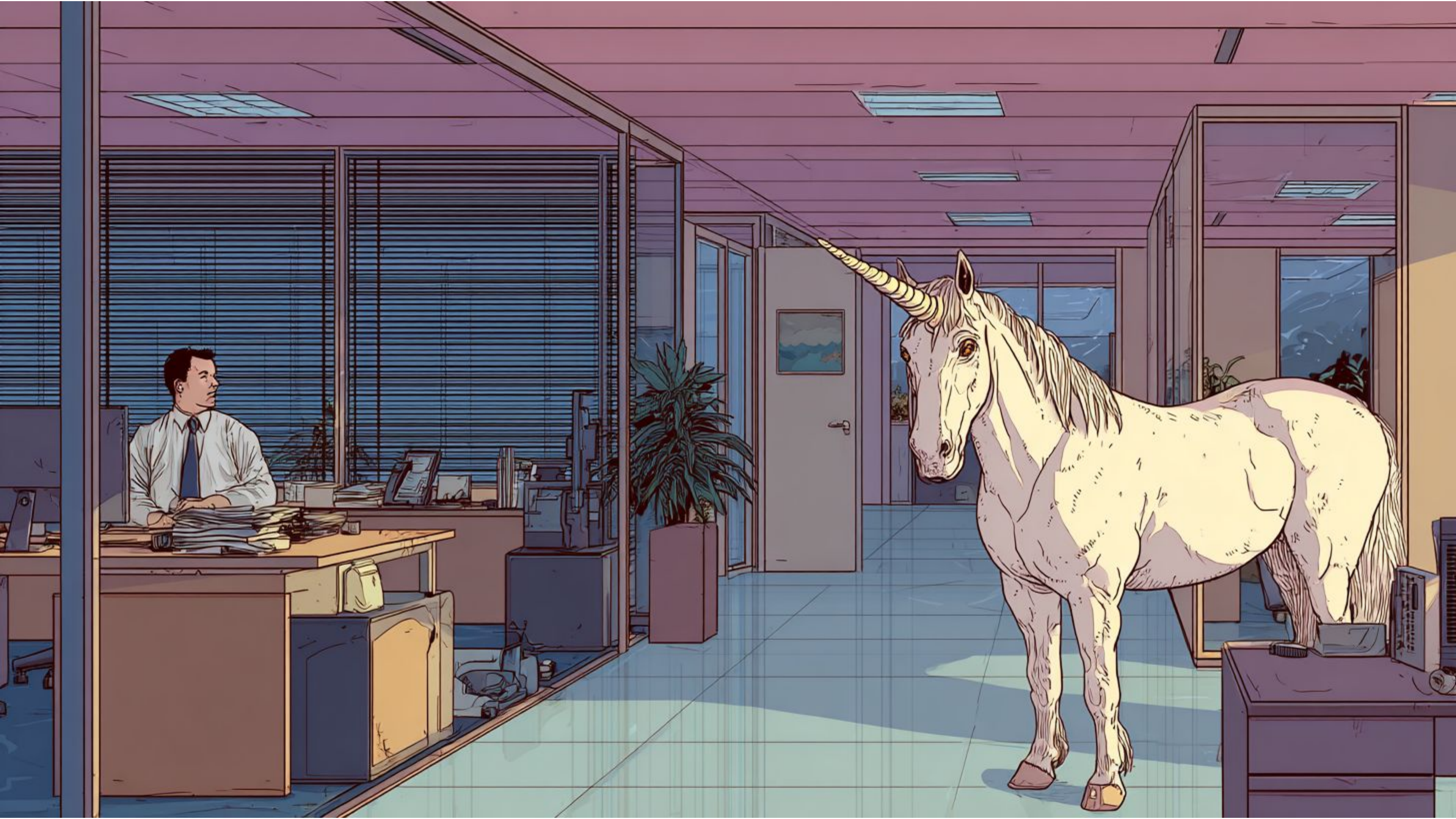
ABILITIES

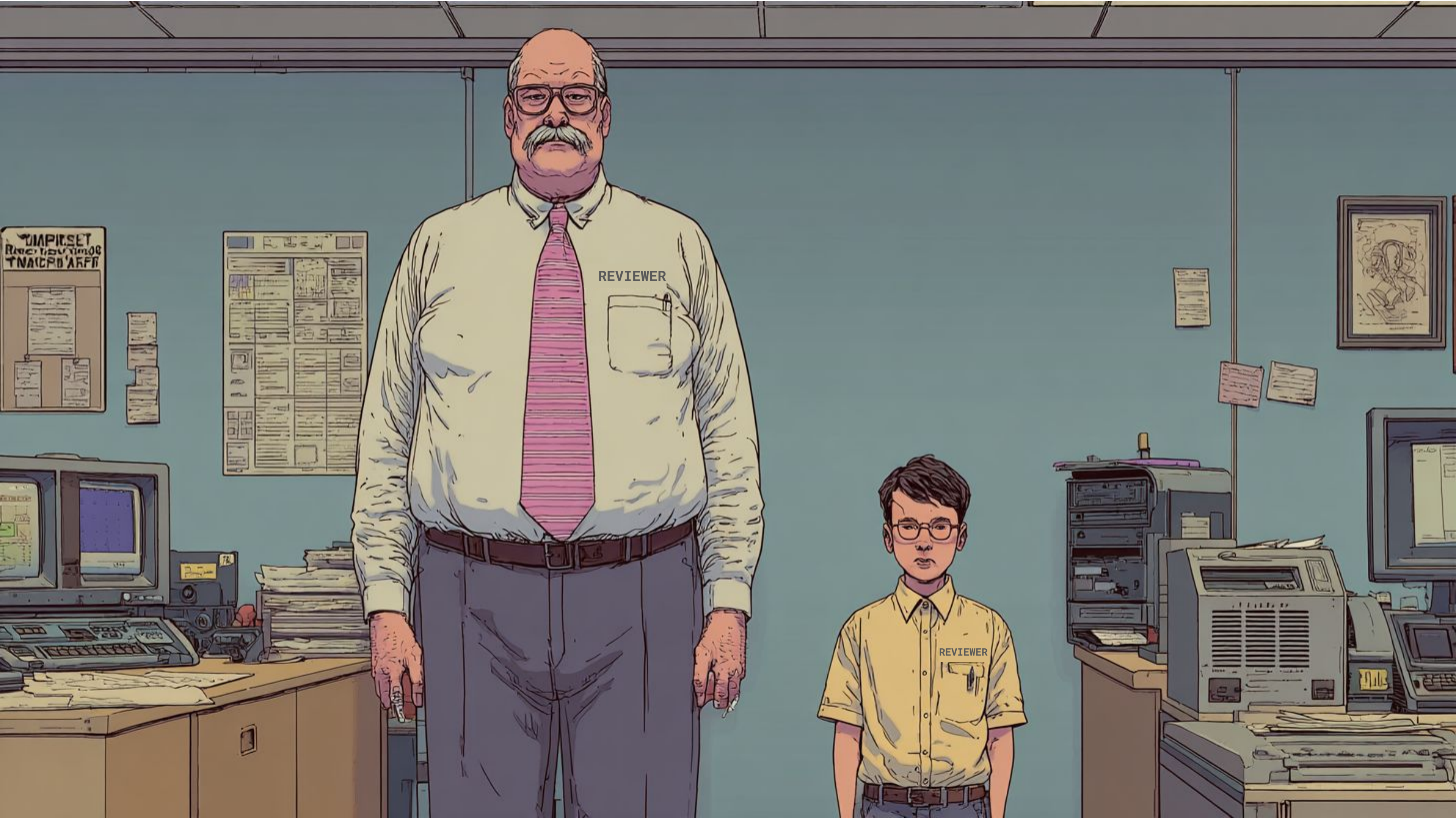
The tasks we cling to are someone else's opportunity

Use the right naming convention
Put ‘em in the right place
Annotate them
Does it tie to the accounting file?

4

Technical review deskilled




REVIEWER
REVIEWER

Tax Return Difficulty Scale

Level 1

Gov't forms only
No itemized ded's

Level 2

Adj's to income

Level 3

Itemized ded's

Level 4

Schedule E's

Level 5

Schedule C's

Level 6

Everything else

I can’t trust my preparers!
They’re going to hate this!
What if they make a mistake?
My preparers don’t have time for this!

5

Taming the email monster

Better email in 7 steps

Don’t start your day with email

Check email once per day

Don’t work out of the inbox

Close Outlook

Delegate your inbox

Make monitoring someone else's job

Treat email for what it is:
The receiving bay of your accounting firm

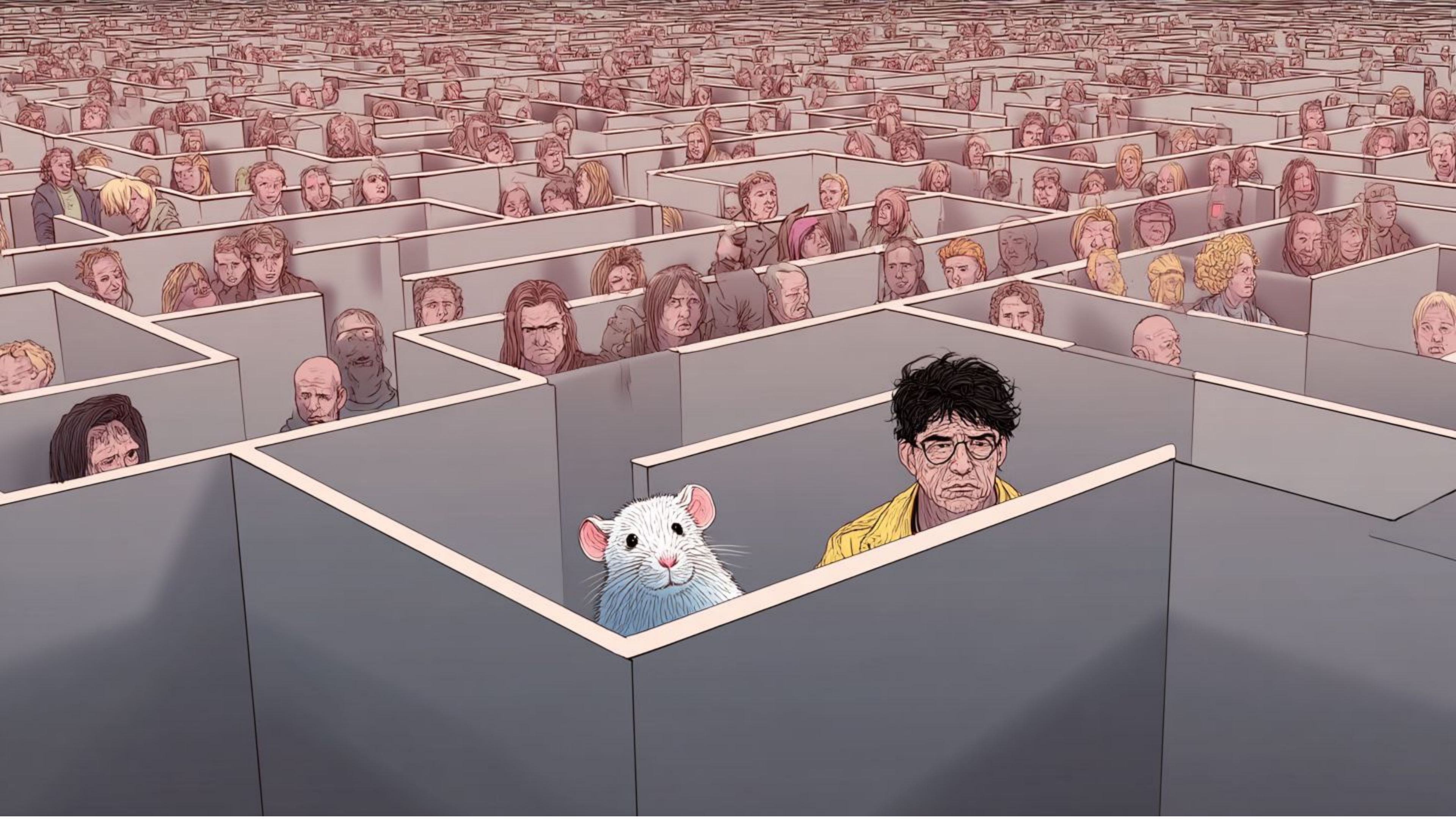
6

Client communication reimagined

What’s the expected turnaround time to get back to a client?

What’s the expected turnaround time to get back to a client?

For partners
For managers
For seniors
For juniors
For admins



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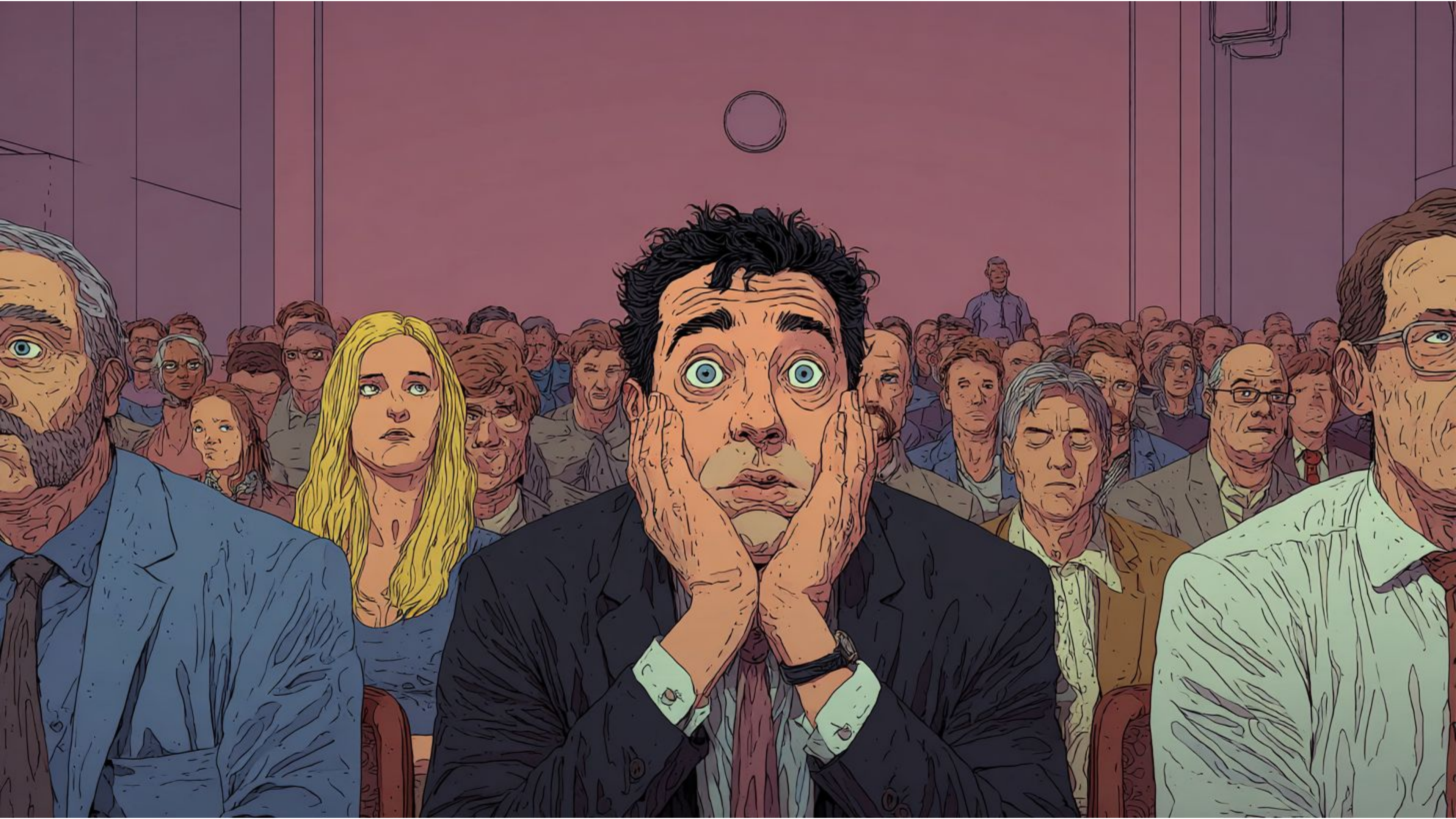
Sticking the landing




YOU ARE WHAT YOU DO

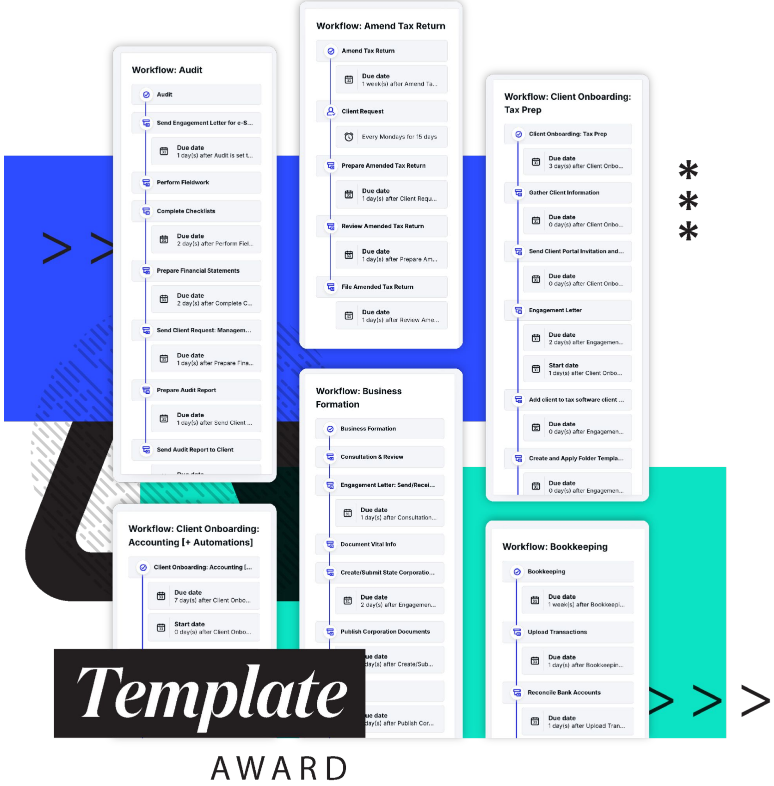


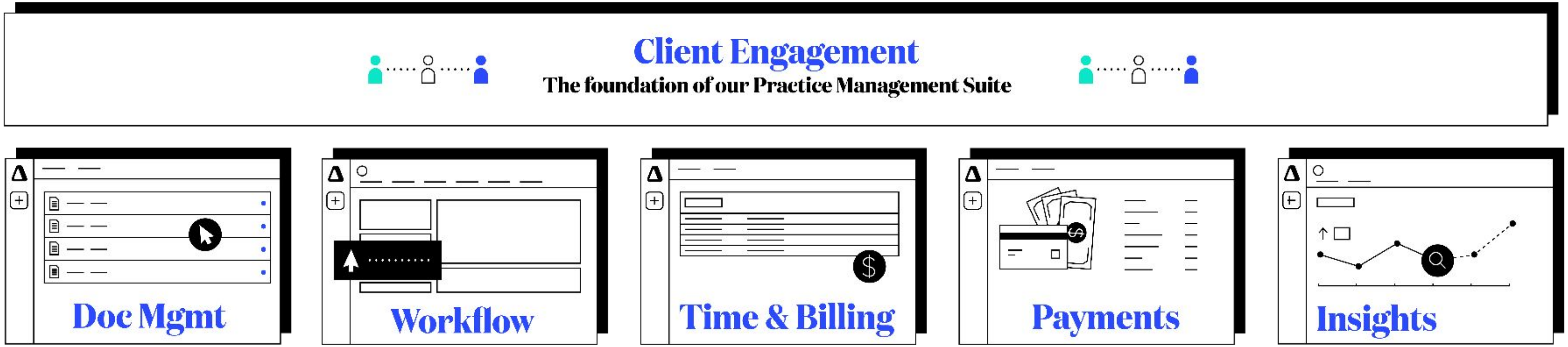
Tavola Group

Dillon Business Advisors


Unclunk
AWARD
Time Dashboard
Time Entry Hours
2.82K
Billable Time Entry Hours
1.49K
Billed Hours
927.18
Total Time Entry Hours by Service Item Last 30 Days
Team Member Time Entry Hours by Service Item

REB CPA

Canopy all-in-one



What’s new?

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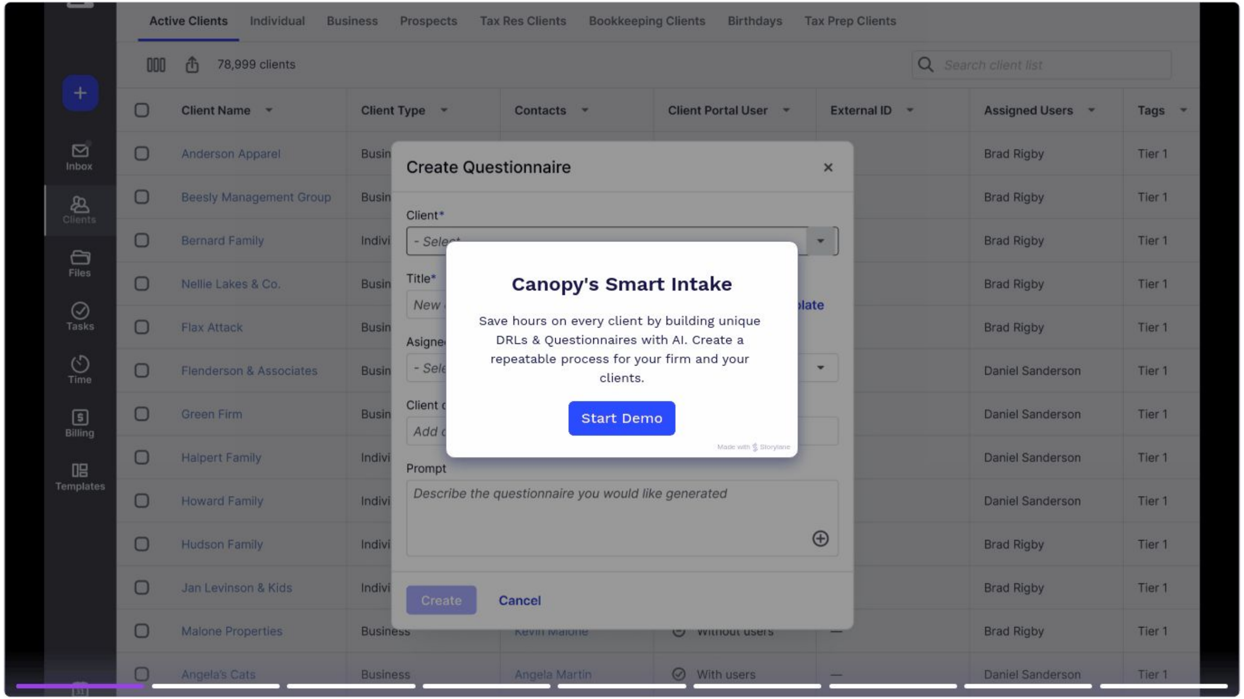
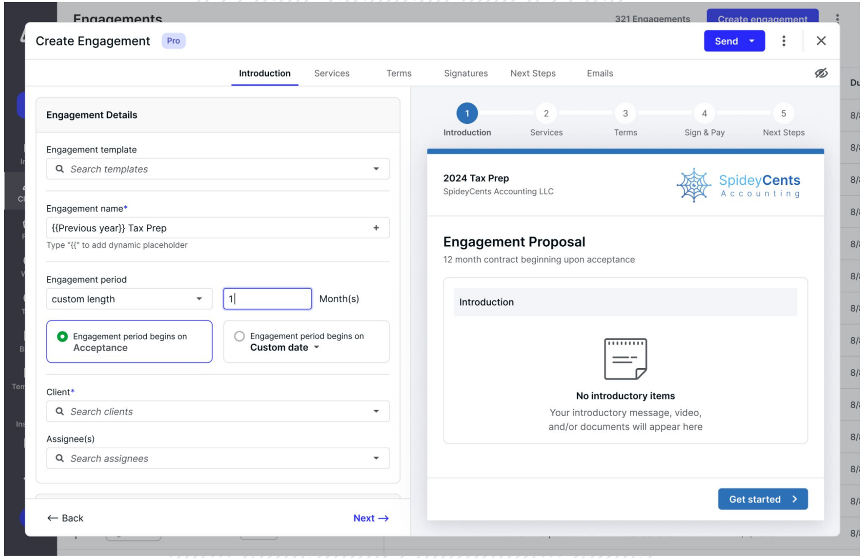
Smart Intake



Engagements



- **Updated engagements builder**
- **Media: attachments, videos, etc.**
- **Automatic billing**

Reliability

99.999% uptime

0 outages

10 second response time

AI

AI Email Drafting

AI Email Summaries

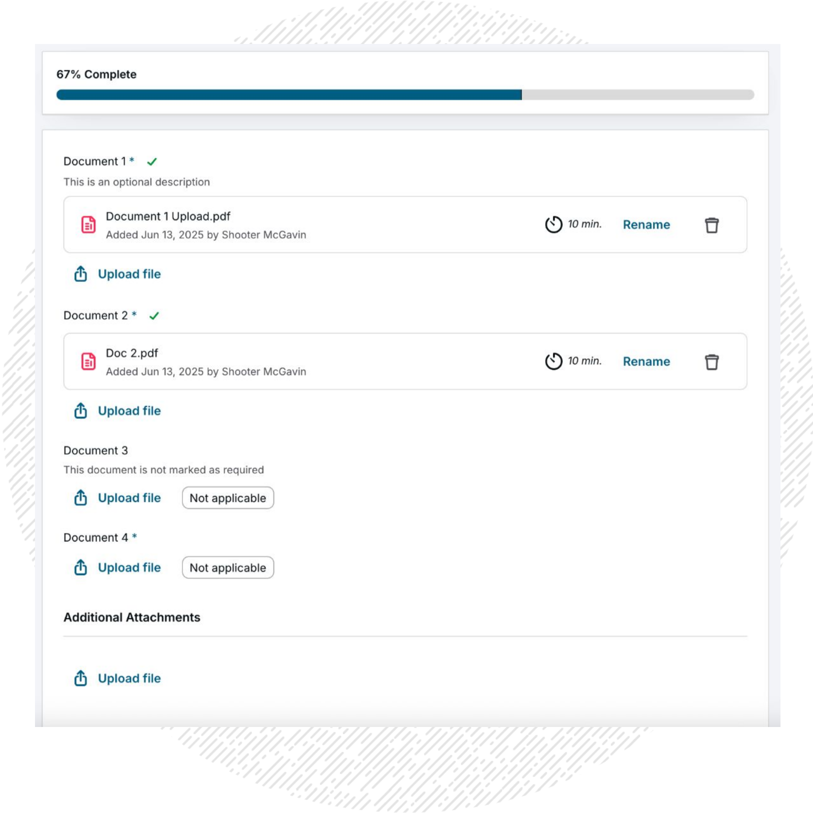
AI Document Renaming

AI DRLs

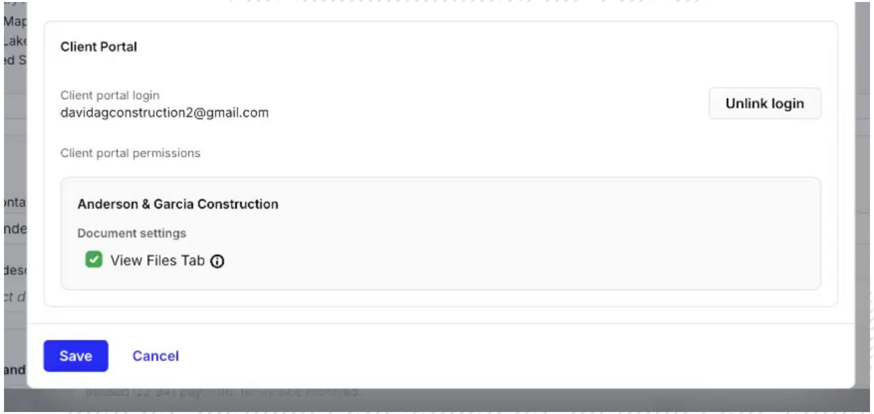
AI Questionnaires

AI Pre-Fill

AI Document Matching



Client Portal

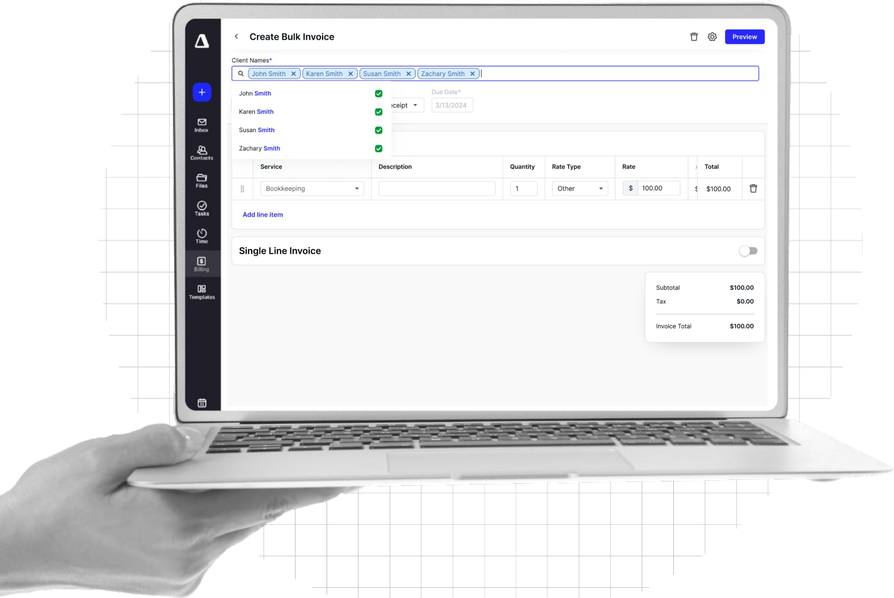


Client portal permissions for contacts

- **Files tab**
- **Folders**
- **Files**
- **Bulk permissions**

Billing & Payments

Included in time & billing

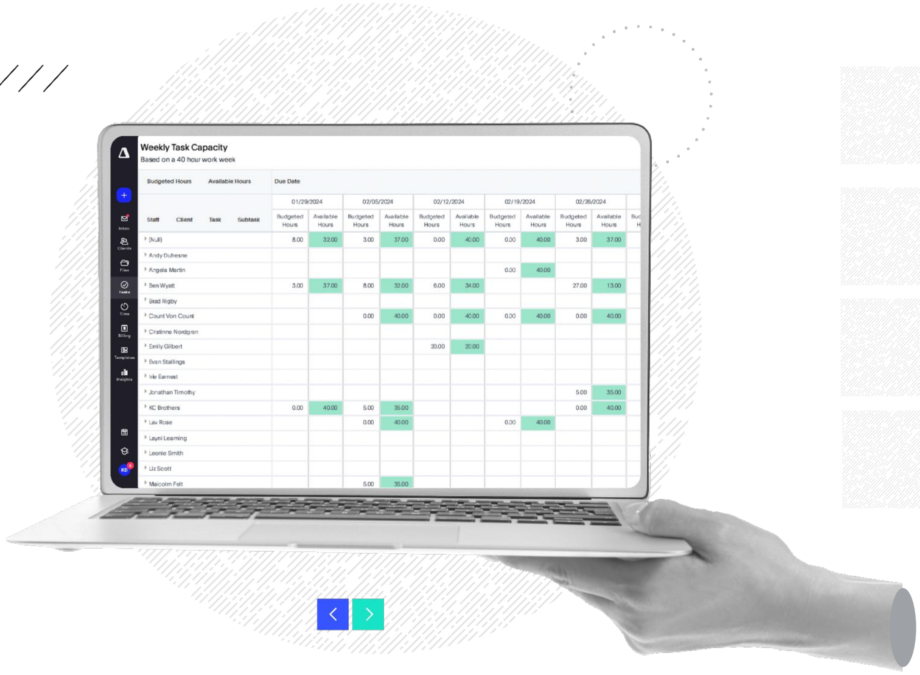


Bulk invoicing

Recurring billing

Credits & deposits

New Insights Reporting



Payments, Credits, Deposits, Expenses

Pre-built, standard reports

Engagements

Data Hub

Roadmap

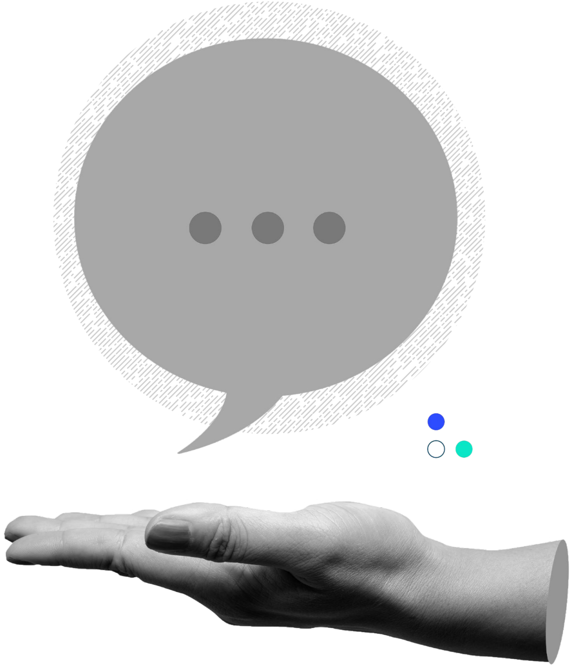
CANOPY SUMMIT 2025

What's next?

Canopy is investing in:

- Communications
- Billing
- Intelligence
- Smarter workflows
- AI

Communications



All communications in one hub

AI meeting assistant

Smart Intake evolutions

Time & Billing

- **New timesheets**
- **Progress billing**
- **Billing at scale**
- **In-person payments**

Practice Intelligence

- **Capacity dashboards**
- **Profitability insights**
- **Deadline and risk alerts**

Smarter Workflow

- New budget tracking
- Improved tags and filters
- Expanding secure links

AI

Smart eSign

Smart search

Intelligent automation