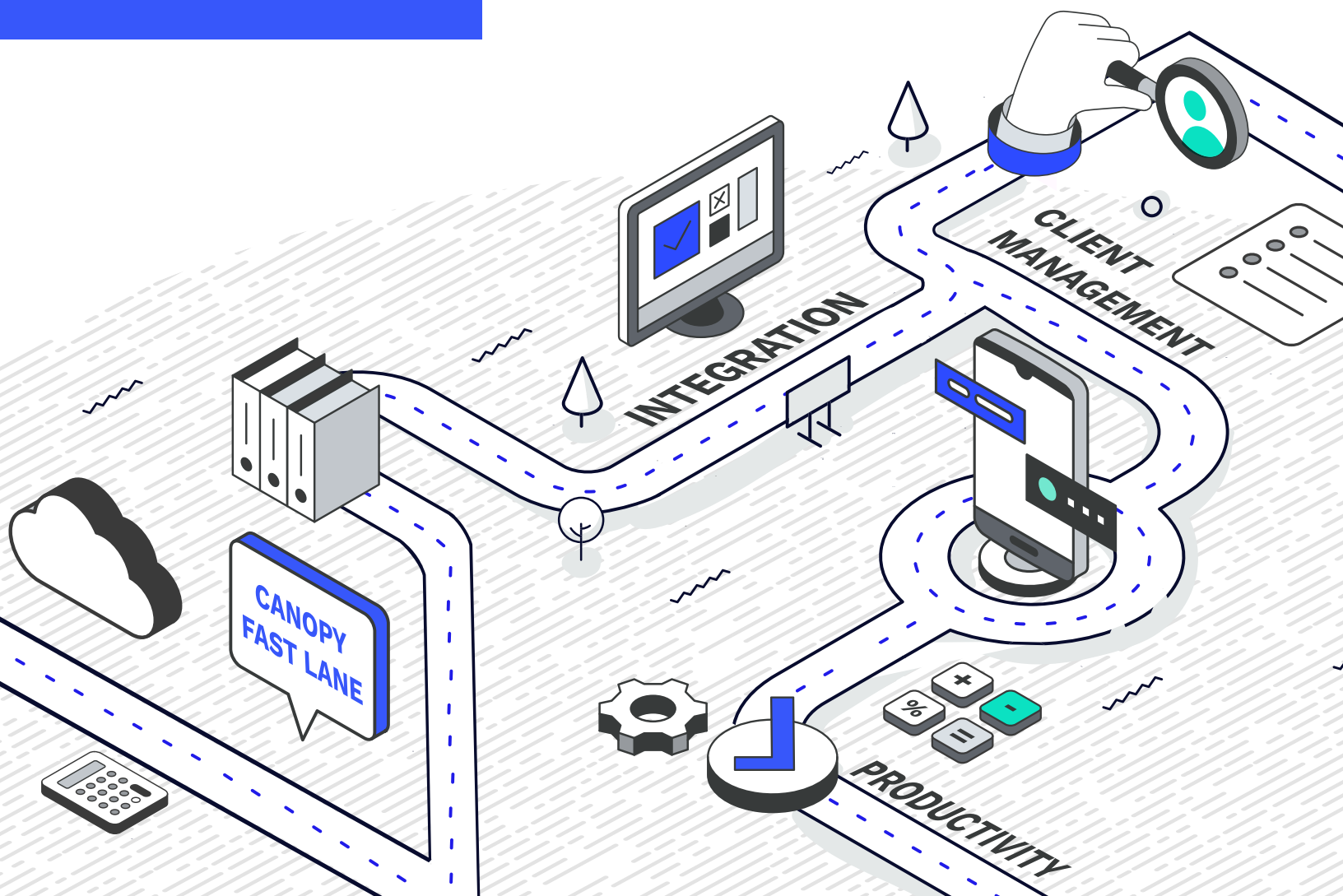


# Practice CS to Canopy:

# The Guide to Switching

# Practice Management

# Software



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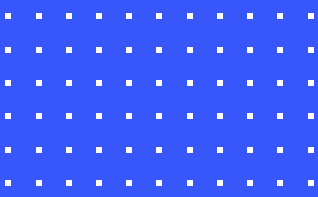
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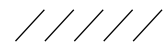
# 01

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## WHY SWITCH TO CANOPY?

Switching to Canopy from Practice CS is a strategic decision that aligns with the forward-thinking approach of modern accounting firms. This shift is particularly advantageous for firms aiming to expand, improve customer experience, provide additional services, increase staff productivity and happiness, or even make their firm more attractive for an acquisition.





# WHY SWITCH TO CANOPY?

## **Modern, User-Friendly Interface:**

Canopy offers a refreshing, intuitive user interface that significantly enhances user experience, making navigation and operation seamless for all users, regardless of their tech savviness.

## **Cloud-Based Solution:**

Welcome to 2024 where “on the go” applies to your work (and not just your snacks). With a cloud-based solution your firm can operate remotely. Access client data and collaborate with your team on your laptop, on mobile, and even on vacation - although not recommended. Thinking about outsourced talent? Go for it!

## **Enhanced Client Engagement:**

Canopy’s CRM allows tracking a contact from beginning to end, including all communications and documents in a single record. Additionally, Canopy’s client portal revolutionizes how firms interact with clients, offering branded engagements, document sharing, and payment functionalities that streamline and elevate the client experience.

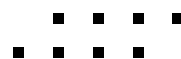
## **Efficiency and Productivity:**

Automated workflows, task management, and customizable templates in Canopy reduce manual efforts and increase operational efficiency, allowing firms to focus more on client service and less on administrative tasks.

## **Did you know?**

Workplace fulfillment and productivity has a lot to do with the systems employees use daily. Attract and retain talent by utilizing a tool that eliminates redundancies, makes work easier and dare we say - fun.





### **Scalability:**

Whether you're a small boutique firm or a large practice, Canopy grows with you, offering scalable solutions that adapt to your changing needs without sacrificing performance or user experience.

### **Support and Community:**

Canopy is not just software; it's a partnership. With extensive training resources and responsive customer support, Canopy users receive the guidance and support needed to make the most out of their Canopy experience.

#### **Did you know?**

Canopy has an award-winning support team. We even extend hours during busy season to accommodate your needs.

### **Updates, enhancements, and bug fixes:**

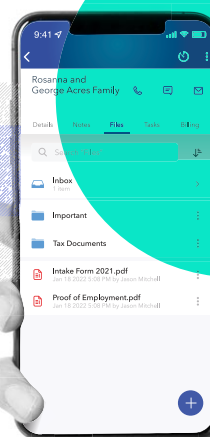
Canopy is modern SaaS technology— Software-as-a-Service. And that's exactly how we see ourselves, as providing a service. Users can rely on regular bug fixes and innovative additions meant to improve our software and the way your firm operates.

#### **Did you know?**

Canopy has an active user feedback portal where you can contribute ideas. Our focus is on delivering an experience that our users will enthusiastically promote.

**Switching to Canopy means embracing innovation, efficiency, and a client-centered approach, setting your firm up for success in today's competitive environment. Explore more differences between Canopy and Practice CS.**

**COMPARE CANOPY VS PRACTICE CS**





“

**We have Canopy for our three-office accounting firm. The implementation team has been helpful, getting us set up with thousands of users. TR is too clunky to use. Canopy is easier to use and has more functionality.**



Christine P. / G2 Review /  
Switched to Canopy from Practice CS

# 02

## MAKE THE SWITCH, STEP BY STEP

### STEP 01

#### **ASSESS YOUR NEEDS & DETERMINE PRACTICE MANAGEMENT GOALS**

Understanding your current setup's strengths and limitations will make it easier to leverage Canopy's features to their fullest.

### STEP 02

#### **COMPILE DATA AND SET THE RECORDS STRAIGHT (FOR GOOD)**

When you properly prepare your data and employees, Canopy becomes the perfect platform to propel your practice. Just picture it: your data organized, workflows automated, and operations running seamlessly.

### STEP 03

#### **IMPLEMENTATION & TRAINING**

Canopy has an award-winning implementation team that will get your firm started and to ROI quickly, averaging just eight weeks to complete implementation and get new firms up to speed.

### STEP 04

#### **REVIEW & GO LIVE**

For a seamless transition day, ensure you've clearly communicated with all involved parties about the timeline and what to expect.



# STEP 1

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## Assess Your Needs & Determine Practice Management Goals



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01 //  
**ASSESS  
CURRENT  
PROCESSES**

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Start by reviewing your current workflows and identifying areas of inefficiency or client friction within Practice CS. Consider how tasks like client communication, document management, billing, and project tracking are handled and how they could improve. This evaluation will help you understand the specific improvements and efficiencies Canopy could bring to these processes.

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**PRO TIP:** Switching Practice Management solutions is a great time to reevaluate internal practices and improve them.

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## 02 // SOLICIT FEEDBACK FROM YOUR FIRM

Gather feedback on software needs from your whole organization. Doing so early on will make for a more informed decision and positively affect implementation and adoption later.

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**PRO TIP:** One option is to send out a concise survey focusing on frequent issues.

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Organize feedback into categories for a structured analysis:

- Key features
- Cost
- System scalability
- Level of support needed



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## 03 // SET GOALS FOR CANOPY

Decide exactly what you want to get out of Canopy. Setting goals should primarily focus on desired outcomes rather than features and align with stakeholders and business goals. You can collaborate with your Canopy representative to refine your objectives.

Some examples include:

- Reducing time to onboard new clients
- Increased rate of proposal acceptance
- Cutting operational expenses
- Increasing revenue
- Identifying an ideal client profile & creating a niche
- Optimizing staff members' contributions to services offered



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**04 //**  
**IDENTIFY A CHANGE  
CHAMPION AND GET  
BUY-IN**

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Identify a Change Champion within your organization to spearhead the move, rallying support and fostering enthusiasm among team members. Ideally this is a trusted member of your firm who is in good standing.

Their role includes:

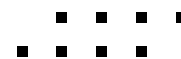
- Understanding Canopy's benefits deeply
- Addressing concerns
- Acting as a liaison between users and management
- Implementation & administration (however, this may be owned by another person)

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**PRO TIP:** An easy transition hinges on getting buy-in early from firm stakeholders, employees, and administrators.

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To secure buy-in, engage stakeholders early and demonstrate Canopy's advantages through demos and discussions. This collaborative approach will pave the way for a successful adoption.



# STEP 2

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## Compile Data and Set the Records Straight (For Good)



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### 01 // COMPILE CURRENT DATA

“Canopy truly has evolved our practice. It helps us stay organized and we always know where things are at. Our task management is better than it ever has been before and the file structure is very user friendly and has numerous features that made our processes simple.”

Brandon T. / G2



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Welcome to life in the cloud! Embrace the transition to Canopy as a chance to start anew, leaving outdated and unused data behind. Start by compiling an inventory of all data, including client details, ongoing projects, historical billing information, and document archives.

Next, identify any customizations or specific workflows unique to your firm that Canopy needs to accommodate. This might involve custom reports, templates, automations, or client communication preferences.

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**PRO TIP:** Switching Practice Management solutions is a great time to reevaluate internal practices and improve them.

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Initiating your journey with Canopy on a clean slate and employing a focused and minimalist approach will enhance clarity, streamline operations, and accelerate adoption.



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## 02 // PRIORITIZE DATA INTEGRITY

Transitioning from Practice CS to Canopy is the perfect moment to fix data integrity issues that often plague accounting firms. Issues like redundant contacts, disorganization, and missing or incorrect information arise from improper data handling and unauthorized changes.

Often, these issues stem from users with software privileges beyond their job description. With Canopy, you can maintain data integrity, future-proof your firm, and improve client records forever, by easily limiting user access and establishing access permissions in your firm.

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**PRO TIP:** Now is your moment to set the record straight! A software transition is the perfect time to clean up your firm and its data for good.

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Incorporate data integrity measures into your company's culture and processes now in order to prevent data integrity issues in the future. Some examples include:

- Establishing standard operating procedures for data management and integrating them into your client intake process
- Limiting user access based on job requirements (including outsourced or offshore talent)
- Create workflows within Canopy that ensure proper handling and data integrity
- Establish clearly defined roles internally so everyone knows who is in charge of data uploads, integrations, and reports



# STEP 3

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## Implementation & Training



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### 01 // DATA IMPORT

Canopy makes it easy to self-import the data you previously compiled. We will provide a free CSV template for your data import. Now you can start on the right foot as Canopy becomes your central operating system!

Need it all (every last crumb)? With an additional cost, we'll sift through your Practice CS data export and sort out your client records, A/R, and notes —no matter how much. Then assist you in creating:

- Custom Fields
  - Contacts
  - Relationships
- 





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**02 //**  
**CONFIGURATION &  
TRAINING**

“Our experience with Canopy has been a very positive one. Their customer support is excellent. I have appreciated them reaching out to us to see how we are doing certain tasks.”

**Ronda B / G2 Review**

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Our implementation specialists will assist in the configuration of the Canopy software so that your practice is fully supported and can resume work without any hiccups.

During the transition, you'll get a representative who will grow to understand your firm. They'll assess how your firm operated previously and then work to transition (and improve) those workflows and processes in Canopy. Your implementation specialist will help with account settings and setup, building appropriate workflows, and branding your client portal.

When it comes to training, Canopy offers extensive free support and resources for training your team, including webinars, self-guided tutorials, a Knowledge Base, and customer support. If desired, additional professional services are available like custom Insights dashboard configuration.

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**EXPLORE CANOPY PROFESSIONAL SERVICES**



# STEP 4

## Review & Go Live

### FINAL CHECKLIST BEFORE GOING LIVE



#### Data Verification:

Ensure all data transferred from Practice CS is accurate and organized correctly in Canopy.



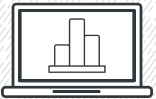
#### Feature Configuration:

Confirm that all desired features and customizations are correctly set up and functioning.



#### User Access:

Double-check that all users have the appropriate roles and permissions.



#### Dashboards and Reports Operational:

If you have Canopy Pro's custom Insights, the most important KPIs to your team are visible. Especially consider the firm-wide goals established before the transition and make them easy to track.

### TIPS FOR A SMOOTH TRANSITION DAY

Monitoring system performance and user feedback throughout the day is key to identifying and resolving any immediate concerns. Finally, celebrate the successful move to Canopy with your team! It recognizes the effort out into a smooth transition and sets a positive tone right from the start.





# 03

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## CUSTOMER STORY

**SMD Consulting & Accounting, LLC eliminates multiple softwares and saves 3 hours a week per employee.**

**SMD Consulting & Accounting, LLC is a 15 person firm in Plano, TX that offers a comprehensive range of accounting services including tax preparation, payroll, bookkeeping, and business consulting.**

Before Canopy, SMD used multiple software programs. One software is for client management and task management, and another is an entirely different secure portal for document storage. It wasn't until they saw Canopy that they realized they didn't need to split their work across 2 platforms.

Canopy facilitated a significant upgrade in their practice management software, enhancing both operational efficiency and client service. The firm benefitted from Canopy's user-friendly interface, robust support, and streamlined processes, overcoming the limitations and support issues they faced with their previous software. This switch has enabled them to focus more effectively on their core accounting services and strengthen client relationships.



**We would not go back to the software we were using before, even if they gave it to us for free.**

Ashley Fontenot,  
Director of  
Operations and  
People SMD  
Consulting &  
Accounting.

