



Build, Connect & Monetize Your CAS Tech Stack

How to create capacity, improve client experience, and turn technology into a competitive advantage

A CAS technology deep dive with Canopy + Infinite Ties

Technology should do more than save time.

The right stack creates capacity, improves margins, strengthens the client experience, and gives your team room for advisory.

Today's Conversation

- Identify the core categories of a scalable CAS technology stack.
- Evaluate tools based on integration, adoption, ROI and client experience.
- Use technology to standardize delivery and create capacity.
- Turn the stack into a client-facing differentiator and new revenue stream.

Core message

A tech stack should support the CAS operating model, not become a collection of disconnected subscriptions.

The technology reality

Most firms do not have a stack problem. They have an operating-model problem.

**Stack ≠
Subscriptions**

**A true CAS tech stack connects
people, process, client
experience, data, and advisory
conversations.**

Poll Question

Which best describes how your firm is currently using technology for CAS?

1. We primarily use our technology for tax and are exploring CAS
2. We offer accounting/CAS services, but the technology is still somewhat fragmented
3. We have a defined CAS stack, but adoption and standardization vary
4. We have a connected, standardized CAS technology model

The common CAS tech trap

Why firms struggle even when they own good software

What firms buy

- More apps
- More features
- More demos
- More integrations
- More promises

What firms actually need

- A clear workflow
- A standard client journey
- Ownership and governance
- Adoption rhythm
- Measured capacity gains

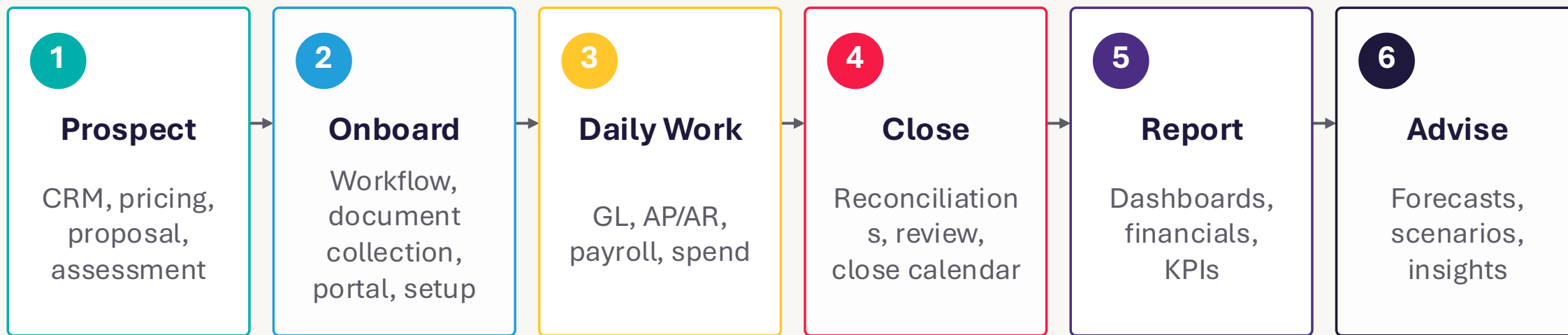
Part 1

Build the architecture

**Design the stack
around how CAS
is delivered.**

Build around the client journey

Technology should follow the way clients move through your CAS experience



The foundational CAS tech categories

Use categories first; name products second

Category	Primary purpose	Capacity question
Prospect & Engagement	Pricing, proposals, engagement letters, renewals	Have you scoped work properly for optimal margin?
Practice management	Own the workflow, deadlines, documents and communication	Can the team see every client, task and bottleneck?
General ledger	System of record for accounting and reporting	Is the data clean enough for advisory-ready financials?
AP / spend / payroll	Automate recurring operational workflows	What manual work can be removed or standardized?
Close & reporting	Turn work into reliable monthly insight	Can we shorten close and improve review quality?
FP&A / advisory	Move from history to foresight	Can the client make better decisions sooner?

Practice management is the operating hub

Why Canopy-style systems matter in a CAS environment

- Centralize client communication, tasks, documents and deadlines.
- Make recurring work visible across the team.
- Create consistency when managers are not in the weeds.
- Reduce “who owns this?” and “where is this?” friction.

Manager question

Can a new team member understand the status of a client without asking five people?

The GL is still the center of gravity

But it should not carry the entire CAS experience

What the GL does well

- Accounting records
- Financial statements
- Transaction detail
- Class/location tracking
- Source data for reports

What should not live only in the GL

- Workflow ownership
- Client document chasing
- Scope tracking
- Team accountability
- Advisory narrative

Poll Question

Where does technology create the most friction in your CAS delivery today?

1. Client document collection and follow-up
2. Handoffs between systems or team members
3. Month-end close and review
4. Reporting and turning data into insight
5. Too many tools with inconsistent adoption
6. We have not clearly standardized our stack yet

AP, spend and payroll: where capacity is hiding

These tools reduce recurring manual friction when used intentionally

- Standardize approvals and payment workflows.
- Reduce email-based document chasing.
- Improve visibility into cash and commitments.
- Create cleaner handoffs between operations and accounting.
- Support better internal controls and client accountability.

Capacity clue

If staff are moving the same data from one place to another every month, technology should be questioned.

Close, reconciliation and reporting tools

The bridge from bookkeeping to advisory-ready financials

- Move recurring close work into a clear cadence.
- Expose review bottlenecks before month-end slips.
- Improve consistency across clients and team members.
- Create cleaner reporting packages and better monthly conversations.

Advisory starts here

The faster and cleaner the close, the sooner the team can talk about what the numbers mean.

The FP&A and advisory layer

Where technology starts supporting better business conversations

- Budgeting and forecasting
- Cash-flow modeling
- Scenario planning
- KPI dashboards
- Multi-entity or dimensional reporting
- Client-facing insight meetings

Important distinction

Advisory technology does not make the advisor. It gives the advisor better questions to ask.

AI belongs in the stack conversation

But only when it solves a clear CAS problem

- Drafting client explanations and follow-up emails.
- Summarizing client activity or document requests.
- Identifying trends, anomalies and review questions.
- Accelerating training, SOPs and knowledge management.
- Supporting but not replacing professional judgment.

Guardrail

AI should be governed like the rest of the stack: use cases, review, confidentiality, security and accountability.

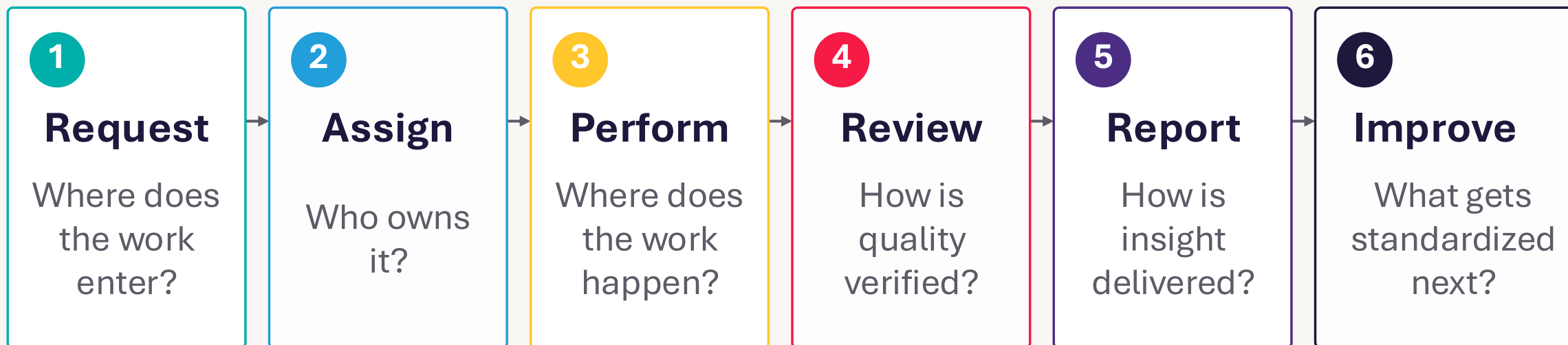
Part 2

Connect the pieces

**The value is not in
the tool. The value
is in the handoff.**

A connected stack reduces handoff friction

Every handoff should have an owner, system and expected outcome



Poll Question

What is the biggest technology challenge in your firm today?

1. Too many disconnected tools or handoffs
2. We own good technology, but adoption is inconsistent
3. We're automating, but we aren't measuring the capacity created
4. The client experience is still too manual or fragmented
5. We aren't sure which tools are actually delivering ROI

The integration test

A tool should earn its place in the stack

Before adding a tool, ask

- What problem does it solve?
- What system does it connect to?
- Who owns adoption?
- What manual work disappears?
- What risk or friction is reduced?

Warning signs

- Duplicate data entry
- Client confusion
- No clear owner
- Low team adoption
- No measurable capacity gain

Technology ROI should be measured

Not just by cost but by capacity created

**ROI = Time saved + Margin protected +
Revenue enabled – Tool cost**

- Estimate hours removed from recurring work.
- Track fewer review points and cleaner handoffs.
- Measure adoption—not just implementation.
- Connect savings to higher-value work or added capacity.

Manager lens

Do not ask “Is the tool cool?” Ask “What capacity, margin, consistency or client value does this create?”

Standardization before customization

Every exception should be intentional.

Preferred Stack

**Approved tools + approved
alternatives + governed
exceptions = scalable CAS
delivery.**

Poll Question

Which technology-related service could your firm most realistically monetize in the next 12 months?

1. Technology assessment and stack recommendations
2. Implementation, conversion or cleanup
3. Dashboard and reporting setup
4. Integration and workflow optimization
5. Ongoing technology management, training or adoption support
6. We haven't considered charging separately for technology services

Your stack should be a standard, not a suggestion

This is how firms avoid technology sprawl

- Define the preferred stack for ideal clients.
- Create approved alternatives for legitimate exceptions.
- Document who can approve a new tool or client exception.
- Review low-adoption tools quarterly.
- Connect stack decisions to pricing and scope.

Leadership language

Standardization is not rigidity. It is how firms protect quality, margin and client experience.

Technology governance: who owns what?

A stack without ownership quickly becomes shelfware

- Tool owner: vendor relationship, configuration and roadmap.
- Process owner: how the tool fits the workflow.
- Training owner: onboarding and reinforcement.
- Data owner: quality, security and reporting.
- Decision owner: exceptions, renewals and replacements.

Simple rule

Every tool needs an owner, a purpose and a review cadence.

Part 3

Monetize the stack

**Technology can
reduce cost and
create revenue.**

Technology can become a revenue stream

Most firms undercharge for the work technology creates

- Client technology assessment
- Implementation or conversion project
- Cleanup and system optimization
- Dashboard or reporting setup
- Integration troubleshooting
- Ongoing technology management
- Training and adoption support

Mindset shift

If the work creates client value, it should be priced as a service, not hidden inside the monthly fee.

Sell the experience and value, not the software

Prospects buy confidence, not software names

Do not lead with

- A list of apps
- Feature comparisons
- A software demo
- Technical language
- “We use the best tools”

Lead with

- Visibility
- Security
- Speed
- Collaboration
- Better decisions
- Less client friction

How technology supports higher-value pricing

The stack should make your delivery model visible

- It shows the client that delivery is structured, not ad hoc.
- It makes the work feel more professional and repeatable.
- It demonstrates stronger controls and communication.
- It supports advisory conversations with cleaner, faster information.
- It helps justify a fixed monthly fee built around outcomes.

Client language

“You will not just receive reports. You will see how the work is managed, reviewed and translated into decisions.”

Part 4

Turn ideas into action

**Assess the stack
you have before
buying the stack
you want.**

The CAS tech stack audit

Keep	Optimize	Replace	Eliminate	Explore
Works well and should become standard	Strong tool but underused	No longer fits the future model	Duplicate or low-value	Capability gap to investigate
High adoption	Needs training or workflow redesign	Too manual or disconnected	Not worth cost or complexity	Potential new capacity/revenue
Document the standard	Increase adoption	Build transition plan	Stop renewing by default	Pilot with clear success metric

Common obstacles and how to avoid them

Technology failure is usually predictable

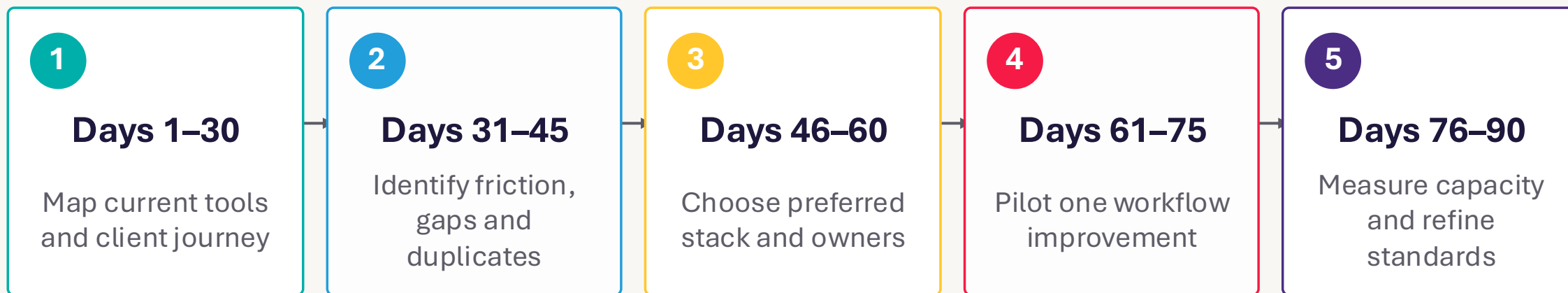
- Buying before defining the process.
- Letting every client choose the stack.
- No owner after implementation.
- No training rhythm for staff or clients.
- Measuring subscription cost but not capacity created.
- Treating setup work as free.

Bottom line

Technology creates leverage only when people actually change how the work gets done.

Your 90-day CAS technology roadmap

Small moves that create momentum



Key takeaways

- Technology should create capacity, not just automation.
- The stack should follow the client journey.
- Standardization is what makes CAS scalable.
- Every tool needs an owner and a purpose.
- Technology can become a differentiator and a revenue stream.

Final thought

The best CAS technology does not replace advisory. It creates room for advisory to happen.



**Build the stack.
Create capacity.
Scale advisory.**

Thank you

Christine Triantos

Co-founder, Infinite Ties
ctriantos@infinite-ties.accountant

Deneen Dias

Co-founder, Infinite Ties
ddias@infinite-ties.accountant

infinite-ties.com

Infinite-advisors.com