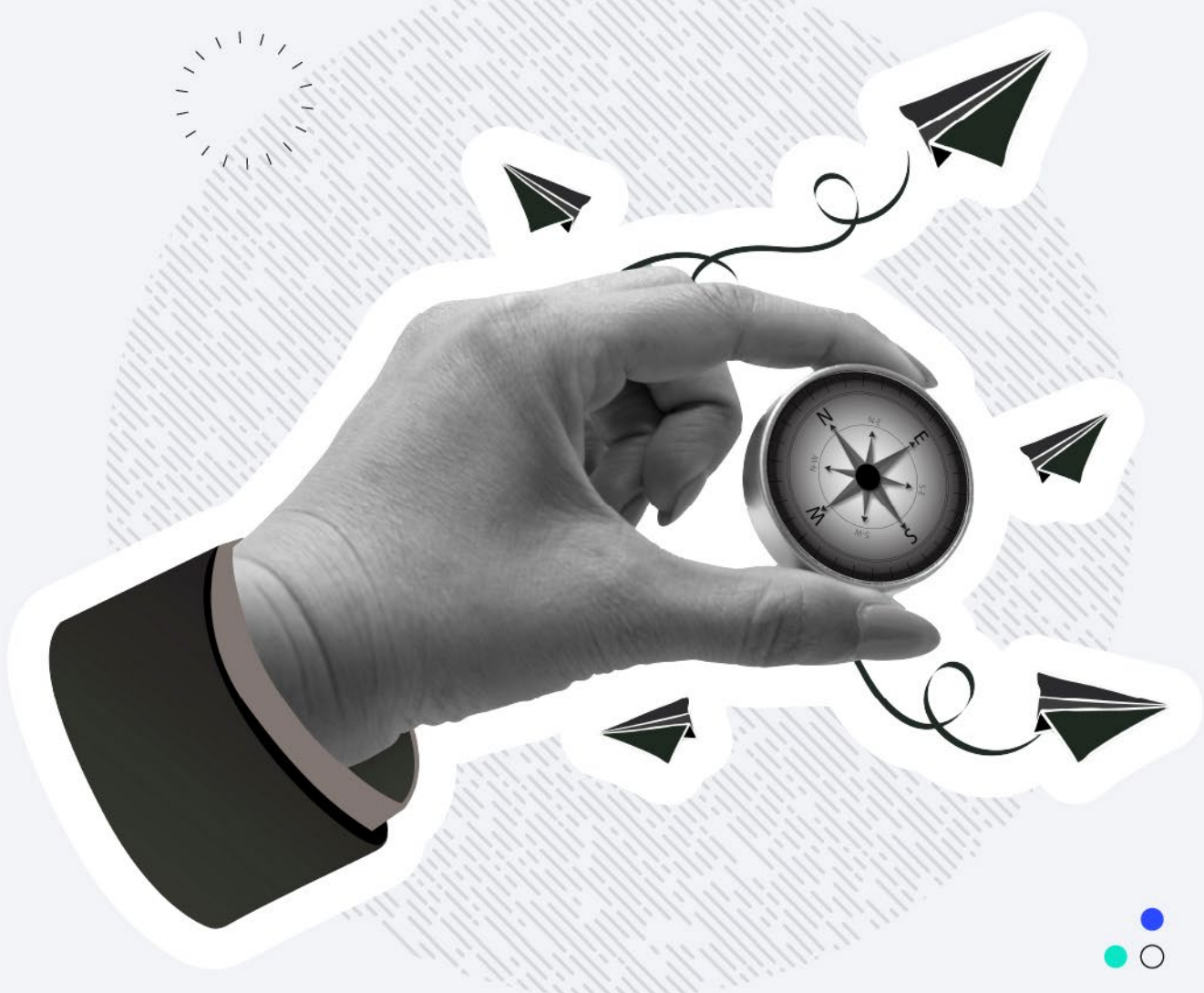




LEADING CHANGE IN YOUR FIRM:

Five Foundational Steps
for Transforming Your
Accounting Practice



Introduction



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My Change Management Perspective

Change has always been a part of the accounting profession. The tools evolve, client expectations shift, firms grow, and the way we operate has to adapt. But while change is constant, so too is resistance. That's why leading change successfully requires a thoughtful approach to people, systems, communication, and execution—whether you're adopting a new technology, introducing a new process, or both.

I've spent my career working at the intersection of operations, technology, and transformation, helping firms understand not only what needs to change, but how to successfully move from where they are today to where they want to be.

My perspective on change management was built through experience, not theory. As a former Director of Operations for an accounting firm, I was responsible for the day-to-day reality of scaling a professional services organization. That meant improving workflows, strengthening operational infrastructure, evaluating systems, supporting teams, and partnering with leadership to create a more efficient and sustainable firm. I learned firsthand that operational change is rarely about fixing one isolated problem. It is about understanding how people, processes, and technology work together, and where friction prevents a firm from reaching its potential.

After transitioning to consulting work, I've expanded that perspective by advising founders and executive teams across professional services and SaaS-enabled organizations.

I help leaders evaluate their operating models, modernize workflows, align technology with business goals, and create practical strategies for growth. Across these engagements, I've seen a common theme: Firms often know they need to evolve, but the path from recognizing the need for change to successfully implementing it can feel overwhelming.

**“SUCCESSFUL OPERATIONAL CHANGE
REQUIRES AN UNDERSTANDING OF HOW
PEOPLE, PROCESSES, AND TECHNOLOGY
WORK TOGETHER, AND WHERE FRICTION
PREVENTS A FIRM FROM REACHING ITS
POTENTIAL.”**

Why Firms Struggle with Change

My consulting work brought me to my current firm, RMW Accounting, where I have the opportunity to apply these lessons on a broader scale as the Director of Practice Innovation. I work with our offices to evaluate their operations, identify opportunities for improvement, and build and standardize a more scalable way of working. This role has expanded my perspective from leading change within a single organization to helping multiple offices navigate the unique challenges that come with growth, modernization, and operational transformation.

Through all of my experiences, I've seen firsthand how firms can become constrained by outdated processes, disconnected systems, or a lack of operational visibility. I want to help leaders move beyond simply identifying those challenges and instead focus on creating practical solutions that their teams can actually adopt and sustain.

Through this work, and through my recent webinars on change management, operating model design, and technology adoption, one theme continues to show up. Most firms do not struggle because they lack ideas. They struggle because execution is hard. Turning strategy into real operational change requires alignment, communication, and a structured approach that brings people along through the process, not around it.

“TURNING STRATEGY INTO REAL OPERATIONAL CHANGE REQUIRES ALIGNMENT, COMMUNICATION, AND A STRUCTURED APPROACH THAT BRINGS PEOPLE ALONG THROUGH THE PROCESS, NOT AROUND IT.”



The challenges are often familiar.

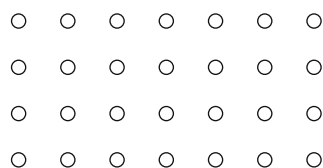
A firm grows, but the processes that worked when the team was smaller do not scale with it. As a result, the following patterns emerge:

- Communication becomes more complex.
- Critical knowledge lives in individual people instead of shared systems.
- Teams develop workarounds because existing processes create friction.
- Leaders find themselves spending more time reacting to operational issues than focusing on strategic growth.

These challenges are not a sign that a firm is failing. In many cases, they're signs that a firm has reached the next stage of growth and needs its operations to evolve alongside it.

Through my experience leading operations internally and consulting with multiple firms externally, I've learned that successful change only happens when people understand the reason behind the change, have clarity around what success looks like, and feel empowered to help shape the outcome.

“For a change to stick, your team needs to understand the reason behind the change, know what success looks like, and feel empowered to shape the outcome.”



The Role of Technology

Technology can be a powerful catalyst for transformation, but technology alone does not create change. The strongest results come when firms align their people, processes, and systems around a shared vision.

My own experience implementing and optimizing systems reinforced this lesson. At my previous firm, the first change I led from beginning to end was the implementation of Canopy's all-in-one practice-management software. This process taught me more about change management than it did about software. Then, through my consulting work, I ran this change more than a handful of times. And I'm doing it again now at RMW, across multiple offices at once.

During my second implementation of Canopy, something became very clear. While the software was the same both times, almost nothing else was. But there were three best practices I made sure to repeat:

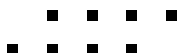
**BRINGING THE TEAM IN
BEFORE I HAD ALL
THE ANSWERS**

**GETTING STARTED
WITHOUT WAITING FOR
AN IDEAL TIME THAT
MAY NEVER ARRIVE**

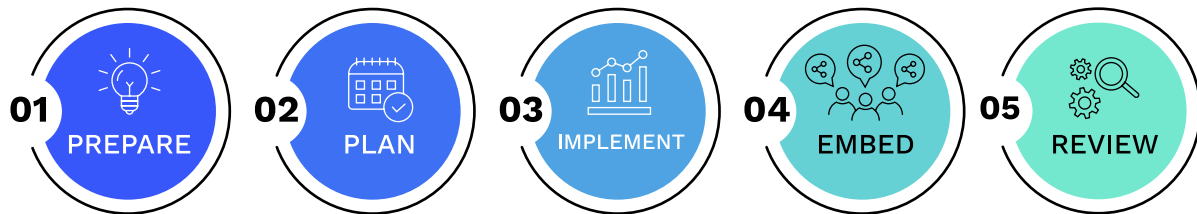
**ADJUSTING THROUGH A
FULL CYCLE INSTEAD OF
TRYING TO GET IT RIGHT
ON DAY ONE**

The goal was never simply to introduce a new platform or automate a few tasks. The goal was to create better ways of working—ways that reduced friction, improved visibility, supported teams, and ultimately created a better experience for both employees and clients.

That is the foundation of this e-book.



Stages of Change



Whether you're implementing new technology, redesigning workflows, improving accountability, or preparing your firm for growth, the principles of change management remain the same. Successful transformation requires a deliberate process that helps your team move forward together.

Throughout this e-book, we'll explore the five stages of leading change, as outlined by [Harvard Business School Online](#) and supplemented by my own personal experience:

1. PREPARE.

Understand why change is needed and create the foundation for team buy-in.

2. PLAN.

Define your vision, establish goals, and build a roadmap with the people who will execute it.

3. IMPLEMENT.

Turn strategy into action while protecting your team's capacity and momentum.

4. EMBED.

Make the change part of your firm's culture, processes, and everyday operations.

5. REVIEW.

Measure results, evaluate progress, and use what you learn to continue improving.

These stages may seem like detours if you're itching to just get started. But trust me, they'll actually make your change initiative more achievable. The firms that succeed in the future will be the ones that know how to lead change intentionally, collaboratively, and with confidence, rather than rushing through it or avoiding it altogether.

I. Prepare



DIAGNOSE BEFORE YOU DISRUPT

Before you touch a single tool or workflow, make sure your team actually understands why the change needs to happen. A pain point in the process can be the weak link that will eventually break the entire initiative. Get the team's attention and address it directly; that's the buy-in that saves you from fighting friction every step of the way later.

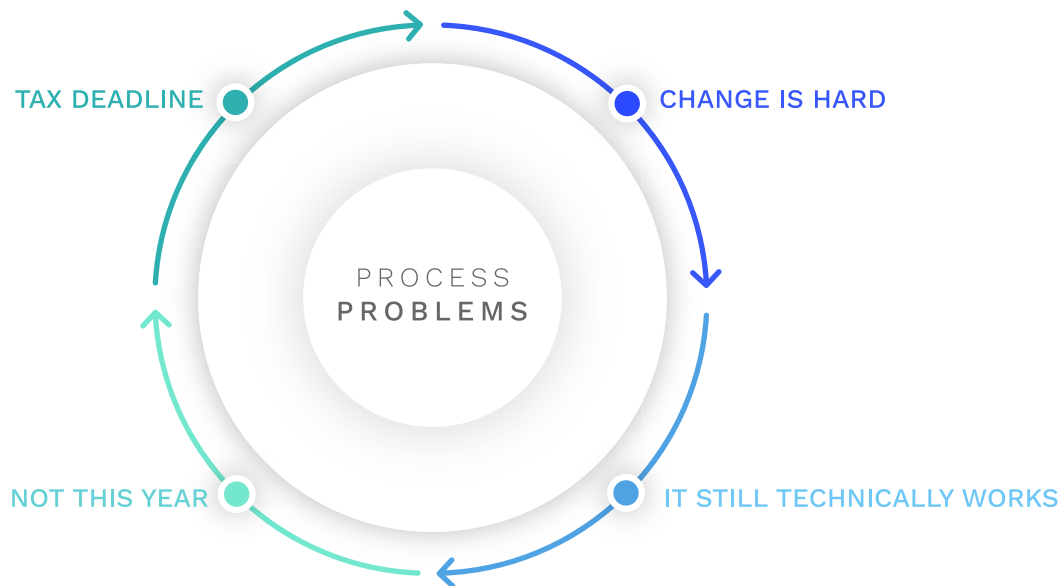
Fun fact about me: every year I build Halloween decorations for my house, and every year they get more elaborate. The last big one was a zombie kraken with six-foot tentacles. Before I shaped a single tentacle, I tested plaster after plaster, because the thing has to hold its thickness through a Colorado October and still be worth pulling out of the box next year.

So I get the idea, scratch it out on paper, calculate the supplies, and plan out the execution. The part nobody sees is all that testing. A piece that wobbles a little in September will fall over on October 31st, in front of everybody, and by then it's too late to do anything but watch it happen.

Here's the thing though. I can always feel that wobble in September. What I have to decide is whether I'm going to stop and fix it, or tell myself it'll probably hold.

Firms do the same thing with process. We know the tax workflow is outdated. We don't update it because change is hard and it still technically works. Then we don't feel what it's costing us until we're in the thick of it on October 15th, watching the whole thing come down in front of everybody.

+ + + +



That's how I've come to think about friction before a change starts. When I bring a change to a team, somebody always hesitates, whether or not they say it out loud. It usually shows up as a long pause, or a "sure, that makes sense" that doesn't sound like they mean it. That's the moment to stop and dig in, not push past.

But be intentional about where and when you address it. Sometimes it belongs in the room, in front of everyone, because the whole team is quietly wondering the same thing, and answering it once saves you five separate conversations. Sometimes it belongs in a private conversation, because the real concern is about someone's workload or their standing on the team, and airing that publicly will only make it worse.

What I don't do is let it go. Friction you don't address doesn't disappear. It moves somewhere you can't see it, and it comes back in month three as workarounds, or as a team member who quietly refused to switch over. In a haunted house, you want things hiding in the shadows. In a change initiative, you don't. Probe hesitations and deal with concerns promptly. Being open and transparent from the beginning will help bring the whole team into the change effort.

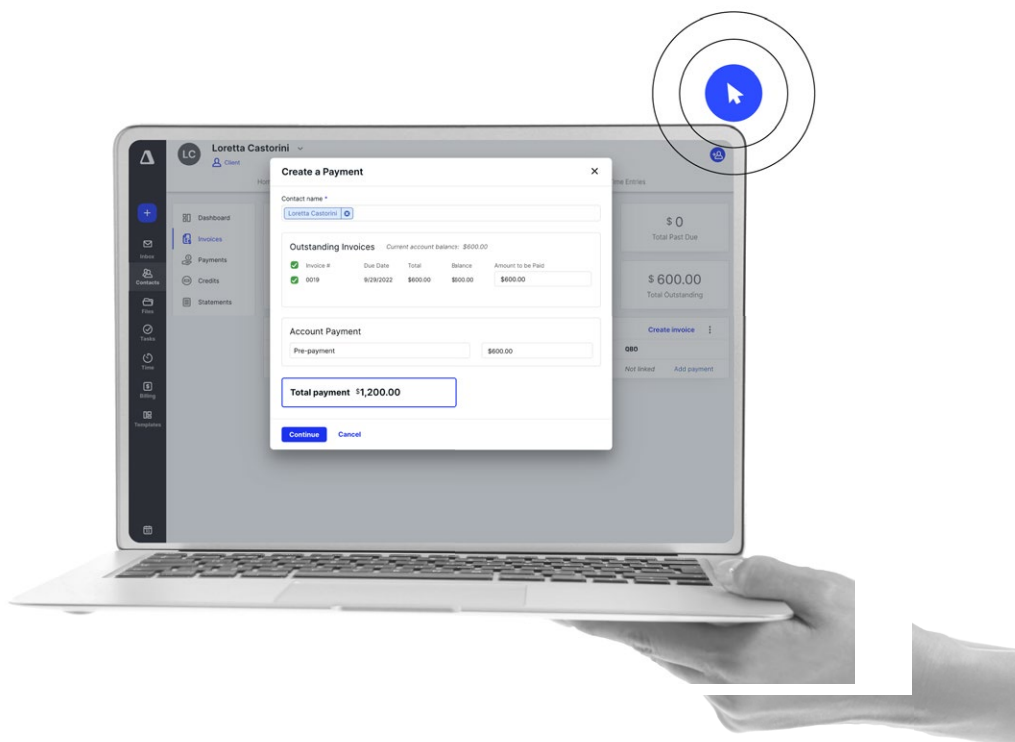
"FRICTION YOU DON'T ADDRESS DOESN'T DISAPPEAR. IT JUST QUIETLY MOVES INTO THE SHADOWS."

I run that same check now across RMW's offices. A verbal complaint from one office is usually sitting unspoken in two others. If I only chase it where I happened to hear it, I've fixed one office and left the others to work around the problem quietly.

How Canopy Can Help

Assuming you've already gone through a change management process to onboard Canopy, and you're now considering making additional changes in your practice, Canopy can help.

Canopy's reporting and dashboards can help surface operational friction early, like overdue work, uneven workloads, and upcoming task volume. That visibility helps firm leaders spot where a process is breaking down before the problem turns into missed deadlines or team burnout.



2. Plan



DECIDE WITH YOUR TEAM, NOT FOR THEM

Once your team understands the need for a change, don't skip straight to execution. Get specific about what success actually looks like, who owns what, and where the lines of this project start and stop, while leaving enough room to adjust when something you didn't plan for shows up.

Along with my passion for Halloween projects, I'm also really into home decorating. About a year ago, I moved into a house that was entirely white. Every wall, every room. It may sound boring, but to me, it was a blank canvas to fill with my creativity. Since then, I've built a library in my office (which you may have seen on our Canopy webinars), a fireplace in my bedroom, and a closet under the stairs that you reach through a hidden door that looks like a bookshelf.

“Change cannot be put on people. The best way to instill change is to do it with them. Create it with them.”

— Lisa Bodell, author and founder of FutureThink

None of those started with a full blueprint. (Turns out, I'm not an architect.) But none of them started with nothing, either. I knew what I wanted the finished room to feel like and what order things had to happen in. Then I opened up a wall, found the framing wasn't where I assumed it was, and adjusted. Nothing I build ever goes exactly to plan, but that doesn't mean the plan itself failed.

A sustainable plan for change needs two things. It needs to be clear enough that everyone can describe the end goal the same way when you ask them separately. And it needs enough “give” that when reality shows up differently from the plan, adjusting doesn't feel like failure. I call these soft guidelines. Firm on the destination, flexible on the route.

But simply having a plan isn't enough; the plan must also be widely shared. Not summarized in a meeting half the team attended, and not saved somewhere no one can find it. Everyone executing the change should be able to look at the same thing and see what's happening, who owns which piece, and where we are right now. If people are working from different versions of the plan, you're not managing one change, you're managing several.

PLANNING FOR CHANGE: 4 ELEMENTS OF SUCCESS

01 STRATEGIC GOALS

What is this change actually supposed to move your firm toward?

KEY PERFORMANCE INDICATORS 02

Decide how you'll know it worked before you start, including what the numbers look like today, so you have something real to compare against later.

03 PROJECT STAKEHOLDERS AND TEAM

Name who's leading this, who needs to sign off along the way, and who owns getting it done.

PROJECT SCOPE 04

Spell out what this change covers and what it doesn't, so nothing sneaks in as scope creep later.

Source: <https://online.hbs.edu/blog/post/change-management-process>

*How Canopy Can Help**

Once you've defined the change, Canopy can help turn it into assigned work using task templates, recurring task templates, and shared task views. Instead of keeping the plan in scattered notes, your team can work from one visible system with clear owners, due dates, and next steps.

**Unless the plan you're building is the implementation of Canopy, of course. Then you can build out your next plan for change inside Canopy's tasks and workflows.*

3. Implement



THE TIMING WILL NEVER BE PERFECT, SO JUST START

The implementation stage is where the plan actually meets real life, and it's where most change efforts either pick up momentum or quietly stall out.

The first week of a rollout isn't about the tool or transformation you're implementing. It's about getting everyone on the same page about what we're trying to accomplish and what "done" looks like. If people can't say the end goal back to you in their own words, the week isn't finished, no matter what got configured.

IMPLEMENTING CHANGE: 4 CRITICAL STEPS

01 EMPOWER EMPLOYEES

Give the people doing the work real authority to adjust how it gets done, instead of handing them a new process to follow exactly.

02 CELEBRATE SHORT-TERM WINS

Name the small results out loud and early, so the team can see progress before the full result shows up.

03 ANTICIPATE ROADBLOCKS AND REMOVE THEM AS THEY ARISE

Anticipate roadblocks and remove them as they arise.

04 FREQUENTLY CONNECT BACK TO THE VISION

Keep repeating why this matters. The reason gets lost faster than you'd expect once people are heads-down in the work.

Adapted from <https://online.hbs.edu/blog/post/change-management-process>

I like to ask a question that has done more for my rollouts than anything else: **what part of your job right now is the most frustrating?** This empowers team members to evaluate their work and their workflows and start thinking about how they can influence things for the better.

People aren't reluctant to tell you their pain points. In fact, they'll usually tell you in great detail, especially if no one has ever asked. Your job is to connect the change you're adopting back to what they said, in specifics. "Oh, that pain point eats an hour every Tuesday?" "Heard. Here is how it's going away." That's the moment the project stops being "firm driven" and becomes "team driven." It's also the fastest way I know to turn a skeptic into an advocate.

When I ask what's frustrating people, the answer I hear most often centers on the timing of the change initiative. Nobody wants to deal with a giant disruption during a busy season, and I understand that completely. But we are always in season. Tax season runs into extensions, extensions run into planning, planning runs into year-end, and then it's January again. If I wait for the quiet stretch where nobody is under pressure, I'll be waiting forever.

So I say that out loud, early, to the whole team. No time is perfect. We just have to start. And I would much prefer to start on purpose, at a moment we chose, than start in a scramble because something finally broke.

"DON'T WAIT FOR THE PERFECT, STRESS-FREE TIME TO IMPLEMENT A CHANGE. IT DOESN'T EXIST. IT'S ALWAYS BETTER TO START AT A MOMENT OF YOUR CHOOSING THAN BE FORCED TO START IN A SCRAMBLE BECAUSE SOMETHING FINALLY BROKE."

Short-term wins work the same way. Early in a rollout, people are deciding whether this is real or whether it's another initiative that fades in six weeks. Pointing to a small, visible result will answer that question better than any amount of reassurance. So I look for the thing that can be fixed in week one, fix it, and make sure people know it happened.

By including your employees in the process and facing their pain points head on, by showing them how this change will benefit them, and by being honest and transparent about what's happening now and what's coming next, you'll find they're much more accepting and willing to adapt. They'll learn through experience how working together makes the whole firm more efficient and productive, which alleviates much of the stress these transformations can otherwise stir up.

How Canopy Can Help

As your rollout begins, Canopy Coworker (an embedded AI execution layer) can help reduce repetitive work across your workflows, so your team can spend more time on judgment-based decisions and less time on time-consuming manual tasks.

Hi, I'm Coworker!
How can I help you today?

✦ Help me optimize my work week >

✦ Help me rebalance my firm's workload based on current capacity and at risk work >

✦ Help me track down clients that we haven't heard back from recently >

How can I help you today?



4. Embed



BUILD CLARITY BEFORE YOU BUILD ACCOUNTABILITY

Rolling out the change is only half the battle. The real test is whether your team is still doing things the new way six months from now, when nobody's watching as closely.

Teams backslide. Mine certainly have. For a long time, I treated that as an individual problem, something to be corrected with a reminder about following the process.

I don't see it that way anymore. When someone reverts to the old way, there are really only two explanations. Either they don't understand the new process well enough to use it under pressure, or the new process is broken and the old way genuinely works better for that piece of the job. Both of those are useful to know. Neither one gets solved by reminding people to follow the process.

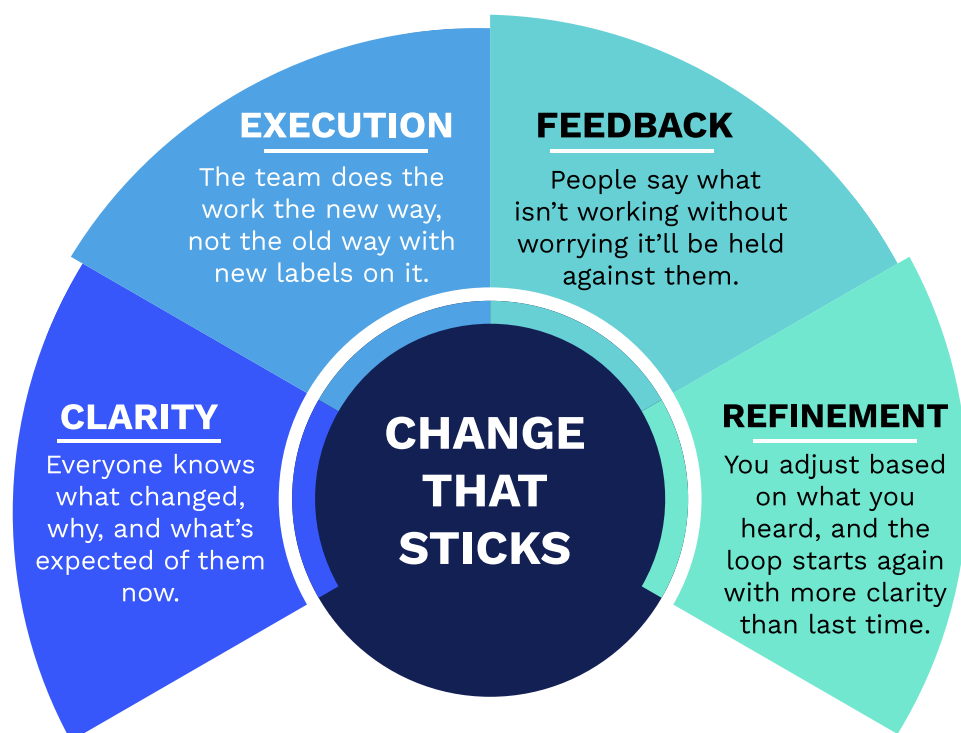
So now, when I catch a backslide, I ask what happened. Not accusingly, just directly. What made you go back to the old way here? The answer is almost always specific and almost always

fixable, and it usually opens a conversation about an improvement

I wouldn't have found on my own. Some of the best refinements I've made came out of watching somebody break the process that was built.

**"SOME OF THE BEST REFINEMENTS
I'VE MADE CAME OUT OF WATCHING
SOMEBODY BREAK THE PROCESS
THAT WAS BUILT."**

This is true for onshore and offshore teams alike. At RMW, I'm working across offices rather than one team down the hall, and that changes what it takes to notice. With a team in the office, you catch a backslide in passing. With a distributed team, you have to go looking, which means building in regular check-ins where the question actually gets asked—not waiting for someone to volunteer that the new way isn't working.



“Culture does not change because we desire to change it. Culture changes when the organization is transformed; the culture reflects the realities of people working together every day.”

— Frances Hesselbein, Former CEO of the Girl Scouts of the USA and Presidential Medal of Freedom recipient

How Canopy Can Help

For distributed and remote teams especially, Canopy helps centralize client context in shared records, notes, and communication history, so key details don't live only in hallway conversations or individual inboxes. That makes new processes easier to reinforce consistently across the firm.

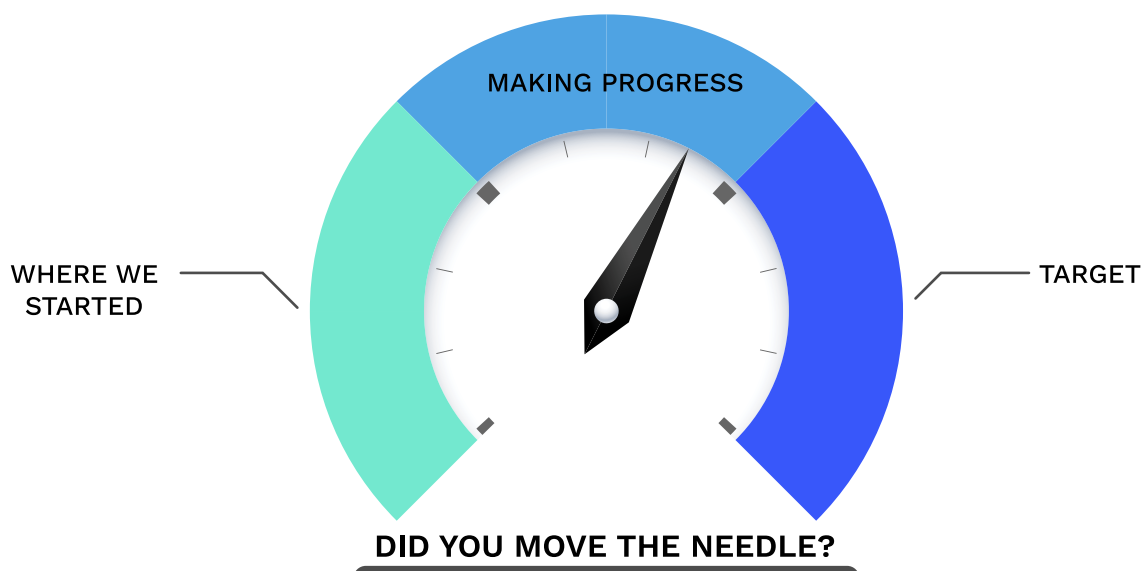
5. Review



CHECK YOUR WORK BEFORE CHECKING IT OFF

Finishing the rollout doesn't automatically mean it worked. Rather than declaring victory and going quiet, it's important to go back and actually check whether this organizational change moved the needle you set out to move and evaluate what you would do differently next time.

You can't evaluate a process in a quarter. In our profession you need a full cycle—a full tax season or a full year—before you know whether something works. Anything shorter will only tell you how the change feels, not whether it holds up under the load it was built for.



When I ran that first implementation at my previous firm, I didn't try to build the perfect system on day one. I used templates to get us through the first year. They weren't customized to us and they weren't what I would have designed from scratch, but they worked well enough to keep us operating while I learned the system.

Then I spent the season watching. Where did people get stuck? And which steps existed because the template said so rather than because we needed them? By the end of that cycle I understood how our firm needed to function inside of Canopy instead of how I'd assumed it did, and I built customized workflows from there.

I was also honest with the team about what we were doing. I told them plainly that the default templates weren't perfect and that I knew it. I was building more than ten workflows for a firm I had never worked in day to day, and I needed them to tell me where I'd gotten it wrong. Being upfront about this got me better information than a year of quiet observation would have.

“Do not confuse motion and progress. A rocking horse keeps moving but does not make any progress.”

— Alfred A. Montapert (1906–1997), American engineer, philosopher, and author

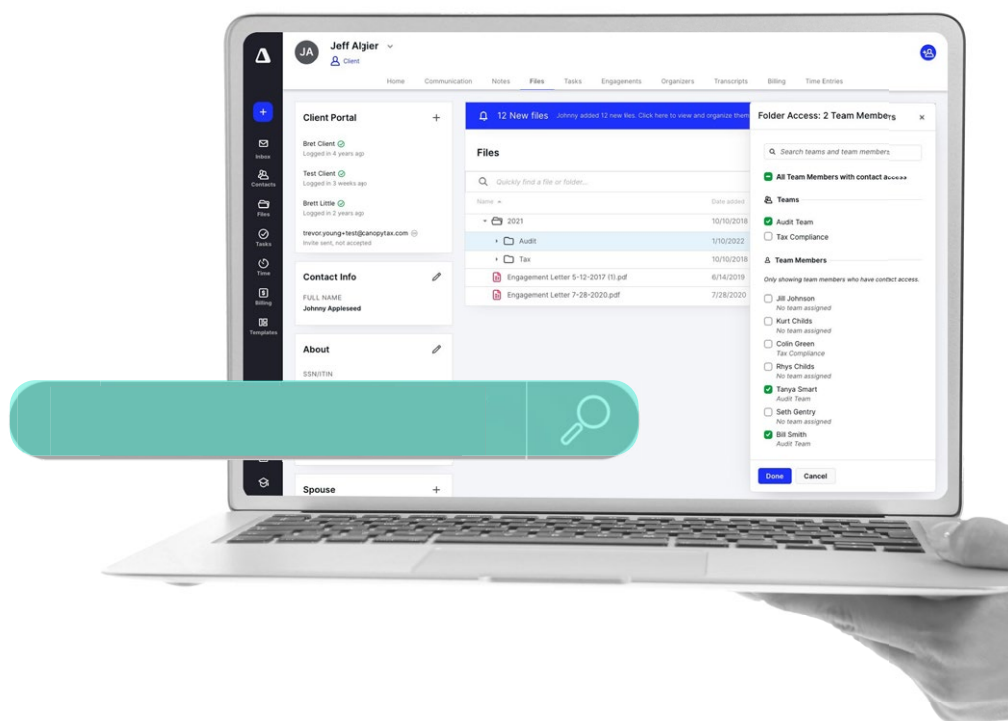
Our clients never noticed any of it, and I take real pride in that. We were ducks on a pond. Calm on the surface, paddling hard underneath.

That approach gave me room to create something great without the pressure to get it right immediately. I think firms often get this backwards. They spend months designing the ideal process before anyone has touched it, then discover in month seven that it was built on assumptions. Starting simple and refining against real use gets you to a better place faster, with much less rework.

I'm applying that same patience across multiple offices at RMW now, and it's harder. One firm gave me one cycle to learn from. Now I'm working with several at once, and I'm currently resisting the temptation to standardize everything before I've actually watched any of them work through a season.

How Canopy Can Help

After the change is in place, Canopy can help you review whether it actually improved execution by showing open work, due-date load, and workload distribution across the team. That gives you something measurable to assess after a season, instead of relying only on whether the process “felt” better.



Parting Thoughts

I've never finished a Halloween build that looked like the sketch. Not once. Same with the house. The library shifted twice before it was done, and the closet under the stairs took a full weekend longer than I told my family it would.

What separates the builds I'm proud of from the ones I quietly took down after a week isn't the planning. It's how early I caught the thing that was going wrong, and whether I was honest with myself about it when I did.

Change in a firm works the same way. You are not going to run a perfect rollout. Something will wobble in September. Someone will slide back to the old way in month four. A process you were confident about will turn out to have been built on an assumption nobody checked. None of that means the change failed. It means you are far enough in to see what's actually true.

The five stages in this book won't guarantee you a clean project. What they will do is make sure you notice things while you can still do something about them: friction before it goes underground, a backslide before it becomes a habit.

“ENCOUNTERING PROBLEMS ALONG THE WAY DOESN'T MEAN THE CHANGE FAILED. IT MEANS YOU'RE FAR ENOUGH IN TO QUESTION YOUR ORIGINAL ASSUMPTIONS AND SEE WHAT'S ACTUALLY TRUE”

Use the checklist on the next page to help you honestly evaluate how things went. And when someone on your team gives you an honest answer to one of these questions, the kind you didn't really want to hear, that isn't a sign the project went badly. Think of it as an opportunity to tackle the next change that's needed in your firm. And then the next one after that.

STAGE**AUDIT QUESTION****SCORE 1-5****1 Prepare**

Is the “Why” behind this change clear and compelling enough to gain team buy-in?

1 2 3 4 5

notes

2 Plan

Do we have concrete goals, defined KPIs, and a clear project scope that prevents scope creep?

1 2 3 4 5

notes

3 Implement

Do we have a plan to empower employees, celebrate wins, clear roadblocks, and connect our efforts to the larger vision?

1 2 3 4 5

notes

4 Embed

Have we made the changes sticky within our existing processes? Is there a feedback loop so problems can be addressed?

1 2 3 4 5

notes

5 Review

Have we quantified our starting baseline? How does our post-change performance data compare?

1 2 3 4 5

notes

Reflection Questions

After the process concludes, explore these questions with your team, so you can either replicate or avoid them with your next project.

01

What was our biggest early win?

02

What was our most unexpected roadblock?

03

What almost made us slide back into the old way of doing things?

05

What did we do that turned out to be unnecessary?

04

When and where did communication break down?

06

What do we wish we had told ourselves on day one, knowing what we know now?

About Canopy

Canopy is the award-winning, all-in-one practice management software designed to help accountants build an autonomous firm. It brings together client management, CRM, document management, workflow, time & billing, engagements, proposals, and more in one place. At the center is Canopy Coworker, Canopy's everywhere AI, which helps make work across the platform simpler, faster, and more automated.

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